

LEADERSlink tutorials:

ADD/DROP STATE REGISTRATION

Please reach out to **Tate Krumwiede** at **303-797-9080 x125** to request support staff access.

There are many reasons why you may need to change the states where you are licensed: You may have a client that moves to a state where you are not currently doing business, you may decide to start soliciting clients in a new state, you may decide to no longer work in a certain state, etc. The LEADERSlink system makes this an easy process to complete. The following instructions will walk you through the process of changing your state licensing, using the Home Office Request function.

Log in to LEADERSlink

If you do not have a login, or do not know how to login, please reach out to: **support@leadersgroup.net**

Navigate to the **Home Office Requests** tab:

The screenshot displays the LEADERSlink web application interface. The top navigation bar includes links for Home, Dashboards, Payout, Accounts, Home Office Requests (which is highlighted), Compliance Approvals, and Books & Records Docs. A search bar is located on the right side of the top bar. The left sidebar contains sections for LeadersLink Resources (with links to Advizr, RightBridge, Training Videos, Starlight Portfolios, and FINRA Manual), a Create New... button, a Shortcut section with a link to Calendar, and a Recent Items section with links to John Test, BRD-3325, Test Business, Household, Test Household, and Test. The main content area is titled 'Dashboard' and includes a Refresh button. Below the dashboard title, it states 'As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.' The dashboard is divided into three main sections: Compensation Overview, Compensation Activity, and Hold/Suspense Report. The Compensation Overview section shows a table with rows for Beginning Balance, Change Since Last Payout, Gross Commission Payable, Less Amount On Hold, and Net Commission Payable, all with values of \$0. The Compensation Activity section shows a table with rows for Current Week (Net), Previous Week (Net), Month-to-Date (Net), Quarter-to-Date (Net), and Year-to-Date (Net), all with values of \$0. The Hold/Suspense Report section shows a table with columns for Client, Hold, Suspense, and Sum of Commission Payable, with a total of 0.00. Below these sections are My Tasks and Calendar sections, both with New buttons. The My Tasks section shows a message: 'You have no open tasks scheduled for this period.' The Calendar section shows a message: 'You have no events scheduled for the next 7 days.' A calendar widget for October 2017 is visible in the bottom right corner, showing the current date as 10/13/2017.

LeadersLink

Bill Advisor

LEADERSlink

Search...

Home Dashboards Payout Accounts **Home Office Requests** Compliance Approvals Books & Records Docs

LeadersLink Resources

- Advizr
- RightBridge
- Training Videos
- Starlight Portfolios
- FINRA Manual

Create New...

Shortcut

- Calendar

Recent Items

- John Test
- BRD-3325
- Test Business
- Household
- Test Household
- Test

Messages and Alerts

Dashboard

Refresh

As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor.

Compensation Overview

Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0

Compensation Activity

Current Week (Net):	\$0
Previous Week (Net):	\$0
Month-to-Date (Net):	\$0
Quarter-to-Date (Net):	\$0
Year-to-Date (Net):	\$0

Hold/Suspense Report

Client	Hold	Suspense	Sum of Commission Payable
Total	-	-	0.00

My Tasks

New

All Open

You have no open tasks scheduled for this period.

Calendar

New Event

Today 10/13/2017

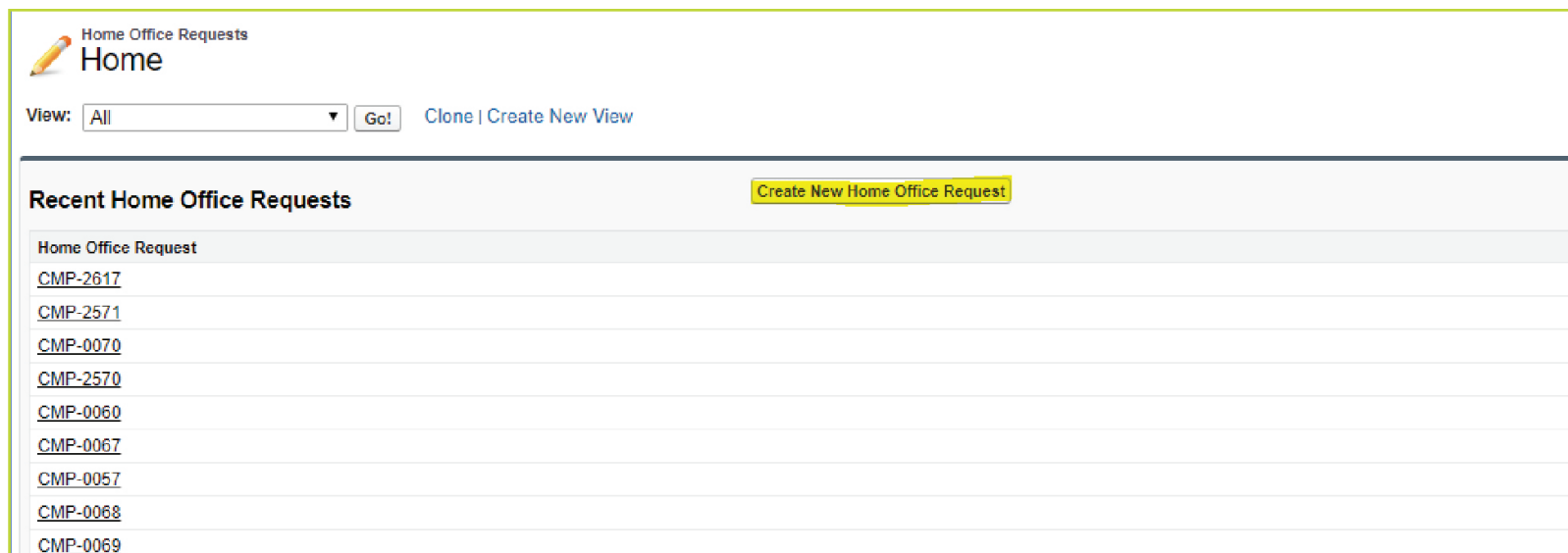
You have no events scheduled for the next 7 days.

October 2017

Sun	Mon	Tue	Wed	Thu	Fri	Sat
01	02	03	04	05	06	07
08	09	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	01	02	03	04

1 7 31

Click **Create New Home Office Request**:



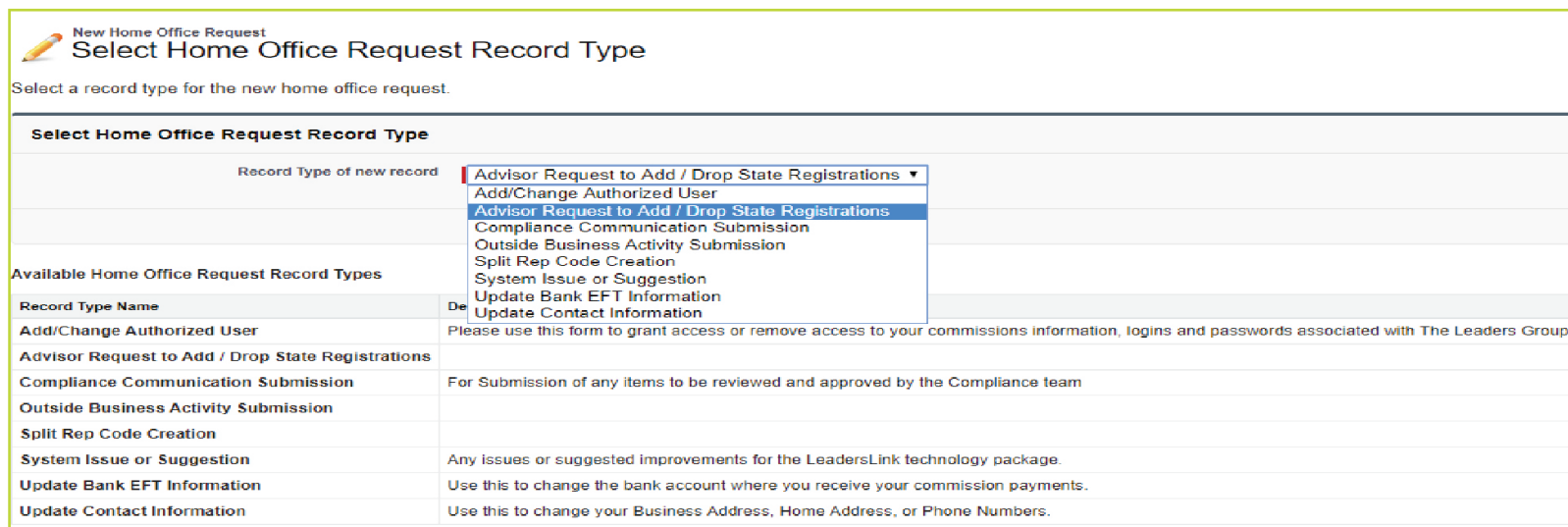
Home Office Requests
Home

View: [Clone | Create New View](#)

Recent Home Office Requests [Create New Home Office Request](#)

Home Office Request
CMP-2617
CMP-2571
CMP-0070
CMP-2570
CMP-0060
CMP-0067
CMP-0057
CMP-0068
CMP-0069

Select **Advisor Request to Add/Drop State Registration**.



New Home Office Request
Select Home Office Request Record Type

Select a record type for the new home office request.

Select Home Office Request Record Type

Record Type of new record

Available Home Office Request Record Types

Record Type Name	Description
Add/Change Authorized User	Please use this form to grant access or remove access to your commissions information, logins and passwords associated with The Leaders Group.
Advisor Request to Add / Drop State Registrations	
Compliance Communication Submission	For Submission of any items to be reviewed and approved by the Compliance team
Outside Business Activity Submission	
Split Rep Code Creation	
System Issue or Suggestion	Any issues or suggested improvements for the LeadersLink technology package.
Update Bank EFT Information	Use this to change the bank account where you receive your commission payments.
Update Contact Information	Use this to change your Business Address, Home Address, or Phone Numbers.

Once your selection has been made, click **Continue**.

At the following screen, complete the form with applicable information. Please note any fields marked with a red bar, must be filled out.

Once the fields are filled out, click **Save**.

Review your form to make sure everything is filled out completely and correctly, then click **Submit Approval**.

Home Office Request
CMP-4519

Home Office Request has been saved.

[« Back to List: Home Office Requests](#)

[Notes & Attachments \[0\]](#) | [Approval History \[0\]](#)

Home Office Request Detail

[Edit](#)
[Delete](#)
[Submit for Approval](#)

Home Office Request

CMP-4519

Record Type

Advisor Request to Add / Drop State Registrations [C]

Advisor

[Bill Advisor](#)

Add State Registration

Do you want to add one or more states?

☒

Is business pending?

☐

State

AK

Effective Registration Date

11/3/2017

Preferred Payment Method

Credit Card

Drop State Registration

Do you want to drop one or more states?

☒

States to Drop Registration

ME

Created By

[Bill Advisor](#), 11/3/2017 12:37 PM

Last Modified By

[Bill Advisor](#), 11/3/2017 12:37 PM

[Edit](#)
[Delete](#)
[Submit for Approval](#)

To check on the status of a request, scroll down to **Approval History**.

Home Office Request
CMP-4519

[« Back to List: Home Office Requests](#)

[Notes & Attachments \[0\]](#) | [Approval History \[2\]](#)

Home Office Request Detail

[Edit](#)
[Delete](#)

Home Office Request

CMP-4519

Record Type

Advisor Request to Add / Drop State Registrations [\[Change\]](#)

Advisor

[Bill Advisor](#)

Add State Registration

Do you want to add one or more states?

☒

Is business pending?

☐

State

AK

Effective Registration Date

11/3/2017

Preferred Payment Method

Credit Card

Drop State Registration

Do you want to drop one or more states?

☒

States to Drop Registration

ME

Created By

[Bill Advisor](#), 11/3/2017 12:37 PM

Last Modified By

[Bill Advisor](#), 11/3/2017 12:38 PM

[Edit](#)
[Delete](#)

Notes & Attachments

[New Note](#)
[Upload Files](#)

No records to display

Approval History

Action	Date	Status	Assigned To	Actual Approver	Comments	Overall Status
Step: Step 1 (Pending for first approval)						
	11/3/2017 12:38 PM	Pending	Registrations	Registrations		Pending
Approval Request Submitted						
	11/3/2017 12:38 PM	Submitted	Bill Advisor	Bill Advisor		

If you have any questions, please email support@leadersgroup.net.