

**LEADERSlink tutorials:**

# **ADD AN OUTSIDE BUSINESS ACTIVITY**

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

Log in to LEADERSlink

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

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 Reason	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

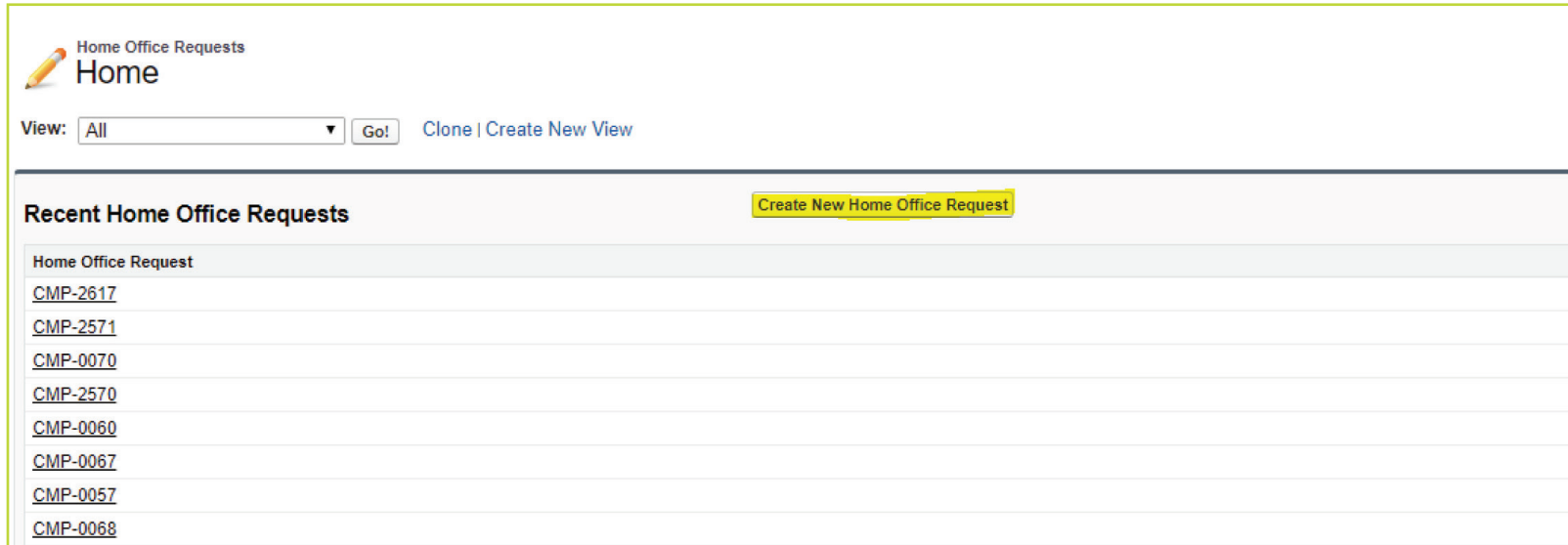
You have no events scheduled for the next 7 days.

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

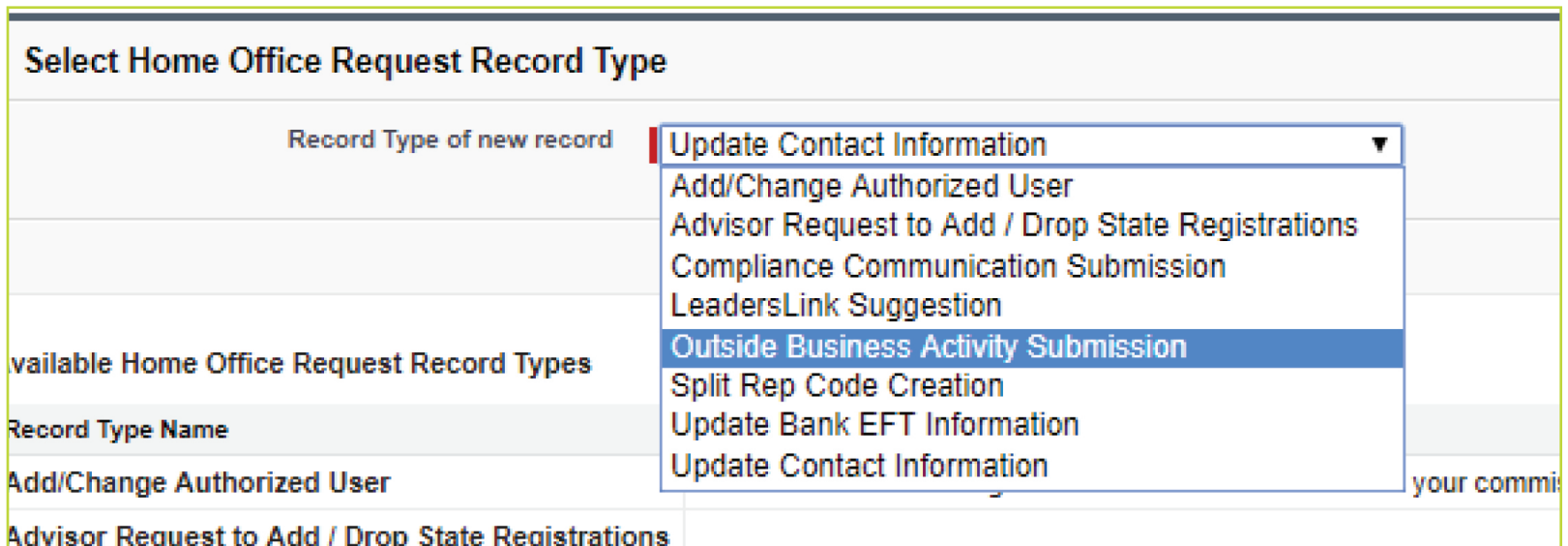
1 7 31

Once on the **Home Office Requests** tab, click **Create New Home Office Request**:



The screenshot shows the 'Home Office Requests' page. At the top left, there is a pencil icon and the text 'Home Office Requests' followed by 'Home'. Below this, there is a 'View:' dropdown menu set to 'All', a 'Go!' button, and links for 'Clone' and 'Create New View'. The main section is titled 'Recent Home Office Requests' and contains a list of request IDs: CMP-2617, CMP-2571, CMP-0070, CMP-2570, CMP-0060, CMP-0067, CMP-0057, and CMP-0068. A yellow button labeled 'Create New Home Office Request' is located at the top right of the list.

Select **Outside Business Activity Submission**:



The screenshot shows the 'Select Home Office Request Record Type' dropdown menu. The dropdown is open, displaying a list of record types. The 'Outside Business Activity Submission' option is highlighted in blue. The other options in the list are: Update Contact Information, Add/Change Authorized User, Advisor Request to Add / Drop State Registrations, Compliance Communication Submission, LeadersLink Suggestion, Split Rep Code Creation, Update Bank EFT Information, and Update Contact Information. The background shows a table with columns for 'Record Type of new record' and 'Record Type Name'.

Record Type of new record	Record Type Name
Update Contact Information	Update Contact Information
Add/Change Authorized User	Add/Change Authorized User
Advisor Request to Add / Drop State Registrations	Advisor Request to Add / Drop State Registrations
Compliance Communication Submission	Compliance Communication Submission
LeadersLink Suggestion	LeadersLink Suggestion
Split Rep Code Creation	Split Rep Code Creation
Update Bank EFT Information	Update Bank EFT Information
Update Contact Information	Update Contact Information

Once chosen, click **Continue**.

Complete any information that you have, please keep in mind any field with a red bar next to them are required before moving on:

New Home Office Request

Home Office Request Edit

SaveSave & NewCancel

Information

Advisor

Signed By

Owner

Bill Advisor

Submission Status

Outside Business Activity

Name of Outside Business Activity

Anticipated Start Date

Describe nature of outside business

Sponsors Name

Address

Home Phone

Contact Person

Duties and Responsibilities

What is your capacity?

How will you be compensated?

Briefly describe your duties:

Compliance Questions

Securities-Related Business

Will current TLG clients be contacted?

Clearly identified as not affiliated

# of hours per month on OBA

Estimate Securities Trading Hours

SaveSave & NewCancel

*Make sure all the information is complete and accurate.*