

LEADERSlink tutorials:

UPDATE CONTACT INFORMATION

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:

The screenshot shows the LEADERSlink web application interface. At the top, there's a navigation bar with the LEADERSlink logo and a search bar. Below this is a tabbed menu with 'Home Office Requests' selected. The left sidebar contains sections for 'LeadersLink Resources' (with links like Advizr, RightBridge, etc.), 'Create New...', 'Shortcut' (with a link to Calendar), 'Recent Items' (with links like John Test, BRD-3325, etc.), and 'Messages and Alerts'. The main content area is titled 'Dashboard' and includes a 'Refresh' button. It displays data as of 10/10/2017 2:24 PM. The dashboard is divided into three main sections: 'Compensation Overview', 'Compensation Activity', and 'Hold/Suspense Report'. The 'Compensation Overview' and 'Compensation Activity' sections show various financial figures in a table format. The 'Hold/Suspense Report' section shows a table with columns for Client, Hold Reason, and Sum of Commission Payable. Below these sections is a 'My Tasks' section with a 'New' button and a message stating 'You have no open tasks scheduled for this period.' At the bottom is a 'Calendar' section with a 'New Event' button and a message stating 'You have no events scheduled for the next 7 days.' A calendar widget for October 2017 is visible in the bottom right corner.

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

Once on the **Home Office Requests** tab, 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 **Update Contact Information**

 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	<div><div>Update Contact Information</div><div>Add/Change Authorized User</div><div>Advisor Request to Add / Drop State Registrations</div><div>Update Bank EFT Information</div><div>Update Contact Information</div></div>
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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	
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.

Click **Continue**.

On the following screen, complete any information that you have, please keep in mind any fields with a red bar next to them are required before moving on:

 Home Office Request Edit
New Home Office Request

Home Office Request Edit Save Save & New Cancel

Information ■ = Required Information

Advisor ■

Change of Address Effective Date ■

Record Type Update Contact Information

Please fill in your new business address, if you are updating it.

Business Address

Please fill in your new home address, if you are updating it.

Address

Please fill in any phone numbers that need updating.

Business Phone

Home Phone

Cell Phone

Fax

Acknowledgement

Acknowledgement I certify that the information that I have provided is accurate and complete as of the date listed below. I acknowledge my responsibility to immediately update the information provided any time this information changes. I hereby certify that I have disclosed all existing and potential conflicts of interest, for which I am aware, as they related to my employment at The Leaders Group, Inc. Should any additional conflicts of interest arise, I agree to promptly notify the Chief Compliance Officer of The Leaders Group, Inc.


Advisor Signature ■

Notes

Description

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

Once all the information is filled out completely and correctly, click **Submit for Approval**.

 Home Office Request
CMP-4520

Printable View

✓ Home Office Request has been saved.

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

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

Home Office Request Detail

EditDeleteSubmit for Approval

Home Office Request CMP-4520Record Type Update Contact Information [Change](#)

Advisor [Bill Advisor](#)

Change of Address Effective Date 12/1/2017

Please fill in your new business address, if you are updating it.

Business Address

Please fill in your new home address, if you are updating it.

Address 123 Main St Apt 2B
Denver CO 12345

Please fill in any phone numbers that need updating.

Business Phone

Home Phone


Cell Phone

Fax

Acknowledgement

Acknowledgement

I certify that the information that I have provided is accurate and complete as of the date listed below. I acknowledge my responsibility to immediately update the information provided any time this information changes. I hereby certify that I have disclosed all existing and potential conflicts of interest, for which I am aware, as they related to my employment at The Leaders Group, Inc. Should any additional conflicts of interest arise, I agree to promptly notify the Chief Compliance Officer of The Leaders Group, Inc.

Advisor Signature  [Bill Advisor](#)

Notes

Description

Created By [Bill Advisor](#) 11/3/2017 12:45 PM

Last Modified By [Bill Advisor](#) 11/3/2017 12:45 PM

EditDeleteSubmit for Approval

To check on the status of the request, scroll down to the **Approval History** area to see where the request is at:

Home Office Request
CMP-4520
Printable View

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

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

Home Office Request Detail
[Edit](#) [Delete](#)

Home Office Request	CMP-4520	Record Type	Update Contact Information [Change]
Advisor	Bill Advisor		
Change of Address Effective Date	12/1/2017		

Please fill in your new business address, if you are updating it.

Business Address

Please fill in your new home address, if you are updating it.

Address 123 Main St Apt 2B
Denver CO 12345

Please fill in any phone numbers that need updating.

Business Phone

Home Phone

Cell Phone

Fax

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Advisor Signature [Bill Advisor](#)

Notes

Description		
Created By	Bill Advisor , 11/3/2017 12:45 PM	Last Modified By Bill Advisor , 11/3/2017 12:51 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 12:51 PM	Pending	Registrations	Registrations		Pending
Approval Request Submitted						
	11/3/2017 12:51 PM	Submitted	Bill Advisor	Bill Advisor		