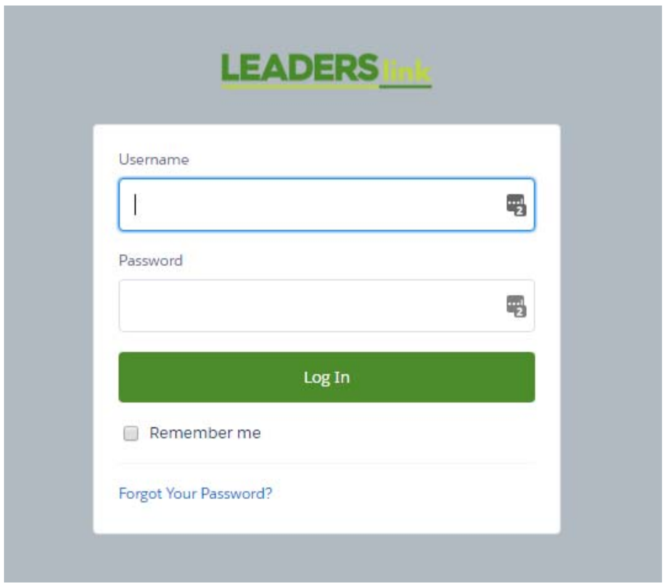
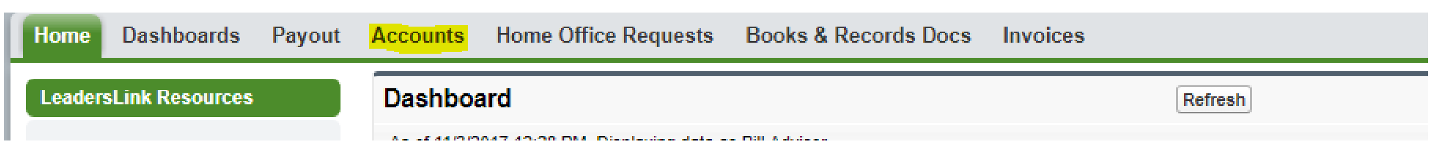
LaserApp Procedures for LEADERSlink

If you are already logged into LEADERSLink and on a client record, skip to step 5. If you are logged In and on the Home tab, skip to step 2.

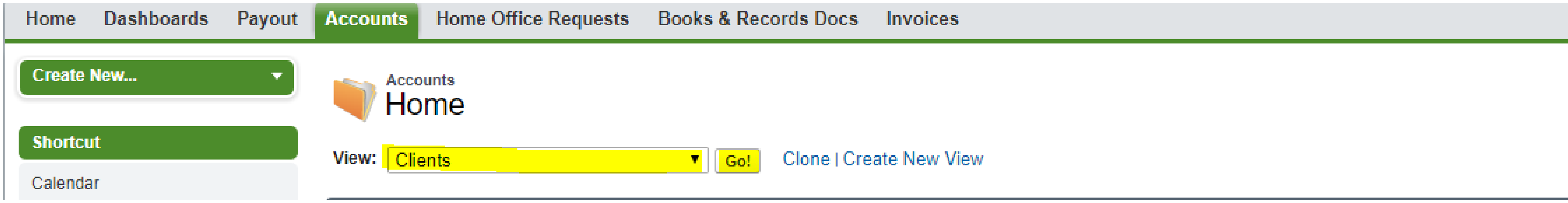
1. Log into LEADERSLink by going to leadersgroup.net/link.



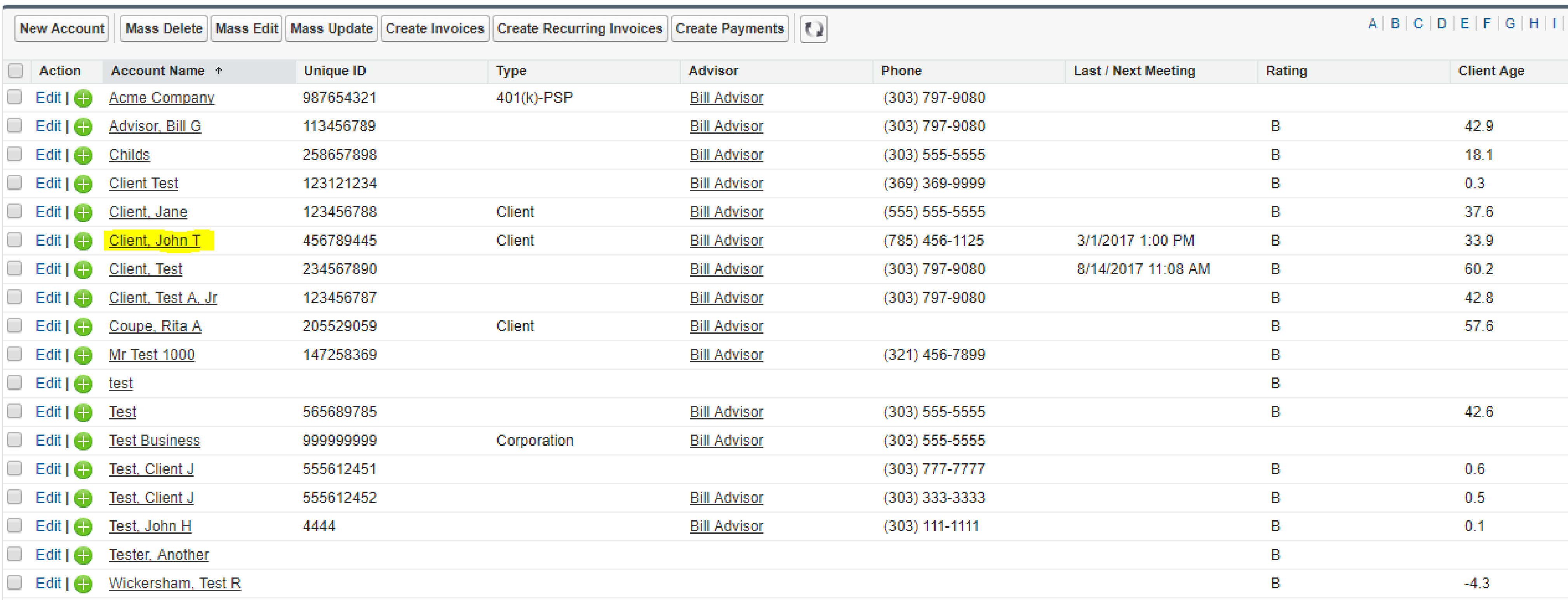
2. After successfully logging in, proceed to click on the accounts tab (highlighted in yellow below).



3. Once on the Accounts tab, select the drop down next to View: and click “clients”. This will display a list of current clients.

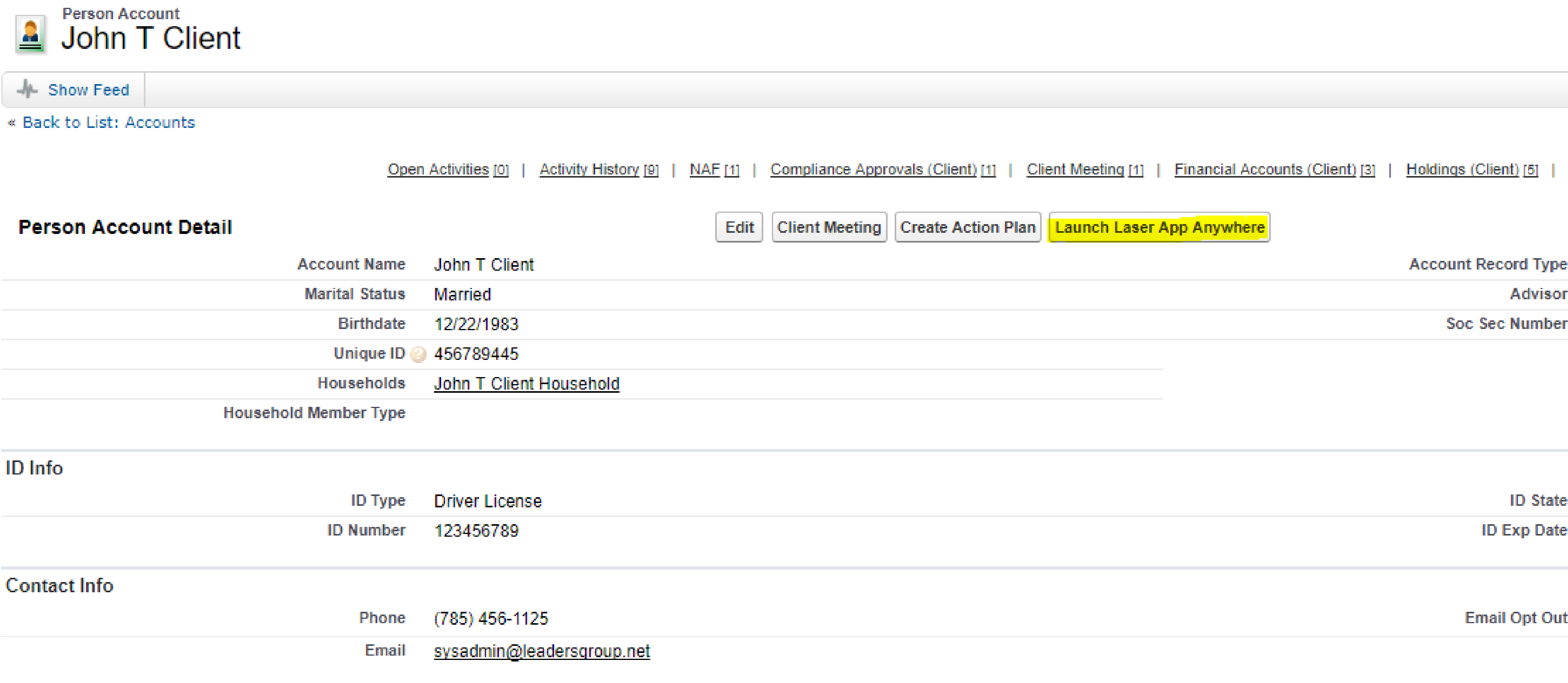


4. Select the client you are opening an account for and click on their name.

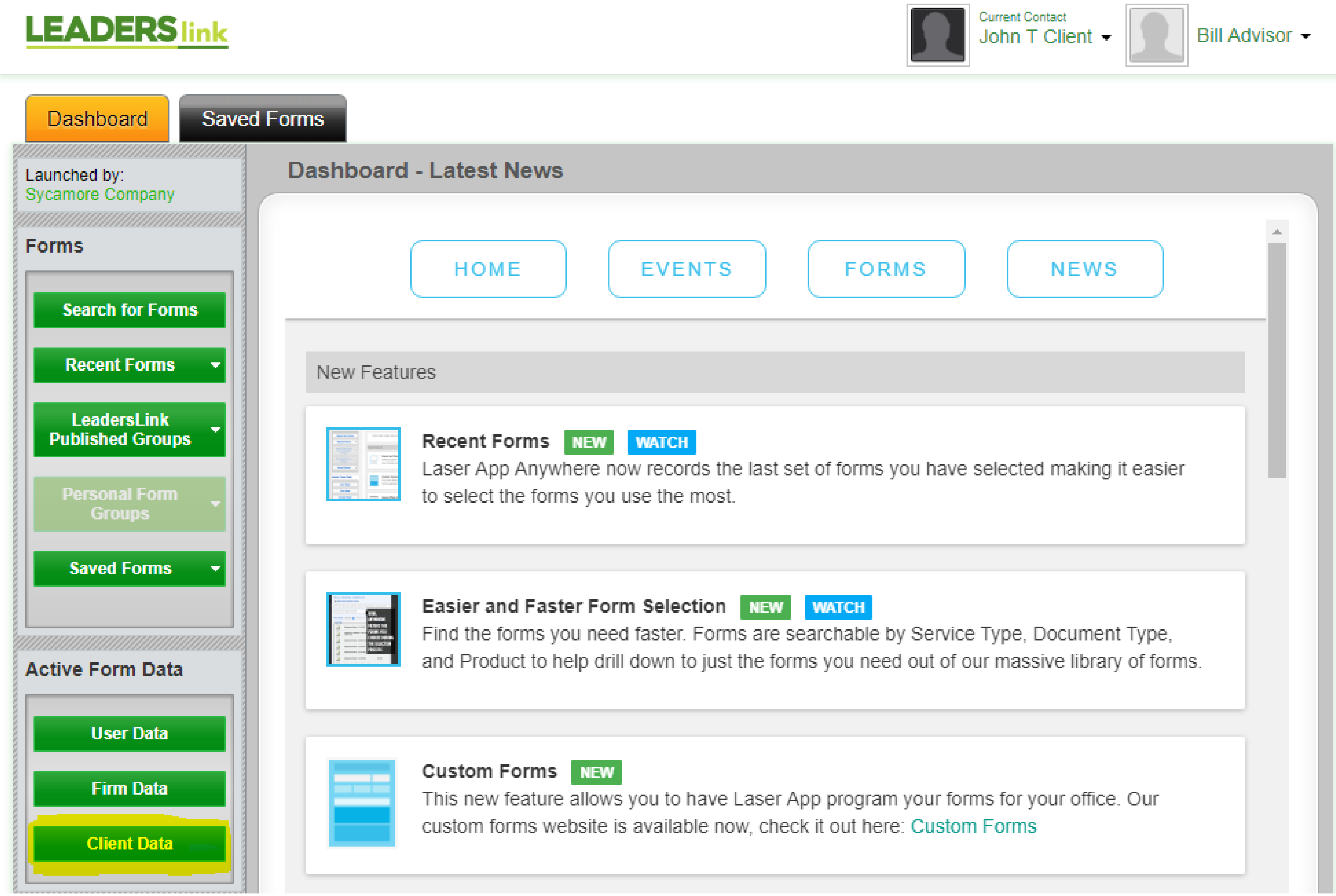


Action	Account Name ↑	Unique ID	Type	Advisor	Phone	Last / Next Meeting	Rating	Client Age
Edit |	Acme Company	987654321	401(k)-PSP	Bill Advisor	(303) 797-9080			
Edit |	Advisor, Bill G	113456789		Bill Advisor	(303) 797-9080		B	42.9
Edit |	Childs	258657898		Bill Advisor	(303) 555-5555		B	18.1
Edit |	Client Test	123121234		Bill Advisor	(369) 369-9999		B	0.3
Edit |	Client, Jane	123456788	Client	Bill Advisor	(555) 555-5555		B	37.6
Edit |	Client, John T	456789445	Client	Bill Advisor	(785) 456-1125	3/1/2017 1:00 PM	B	33.9
Edit |	Client, Test	234567890		Bill Advisor	(303) 797-9080	8/14/2017 11:08 AM	B	60.2
Edit |	Client, Test A, Jr	123456787		Bill Advisor	(303) 797-9080		B	42.8
Edit |	Coupe, Rita A	205529059	Client	Bill Advisor			B	57.6
Edit |	Mr Test 1000	147258369		Bill Advisor	(321) 456-7899		B	
Edit |	test						B	
Edit |	Test	565689785		Bill Advisor	(303) 555-5555		B	42.6
Edit |	Test Business	999999999	Corporation	Bill Advisor	(303) 555-5555			
Edit |	Test, Client J	555612451			(303) 777-7777		B	0.6
Edit |	Test, Client J	555612452		Bill Advisor	(303) 333-3333		B	0.5
Edit |	Test, John H	4444		Bill Advisor	(303) 111-1111		B	0.1
Edit |	Tester, Another						B	
Edit |	Wickersham, Test R						B	-4.3

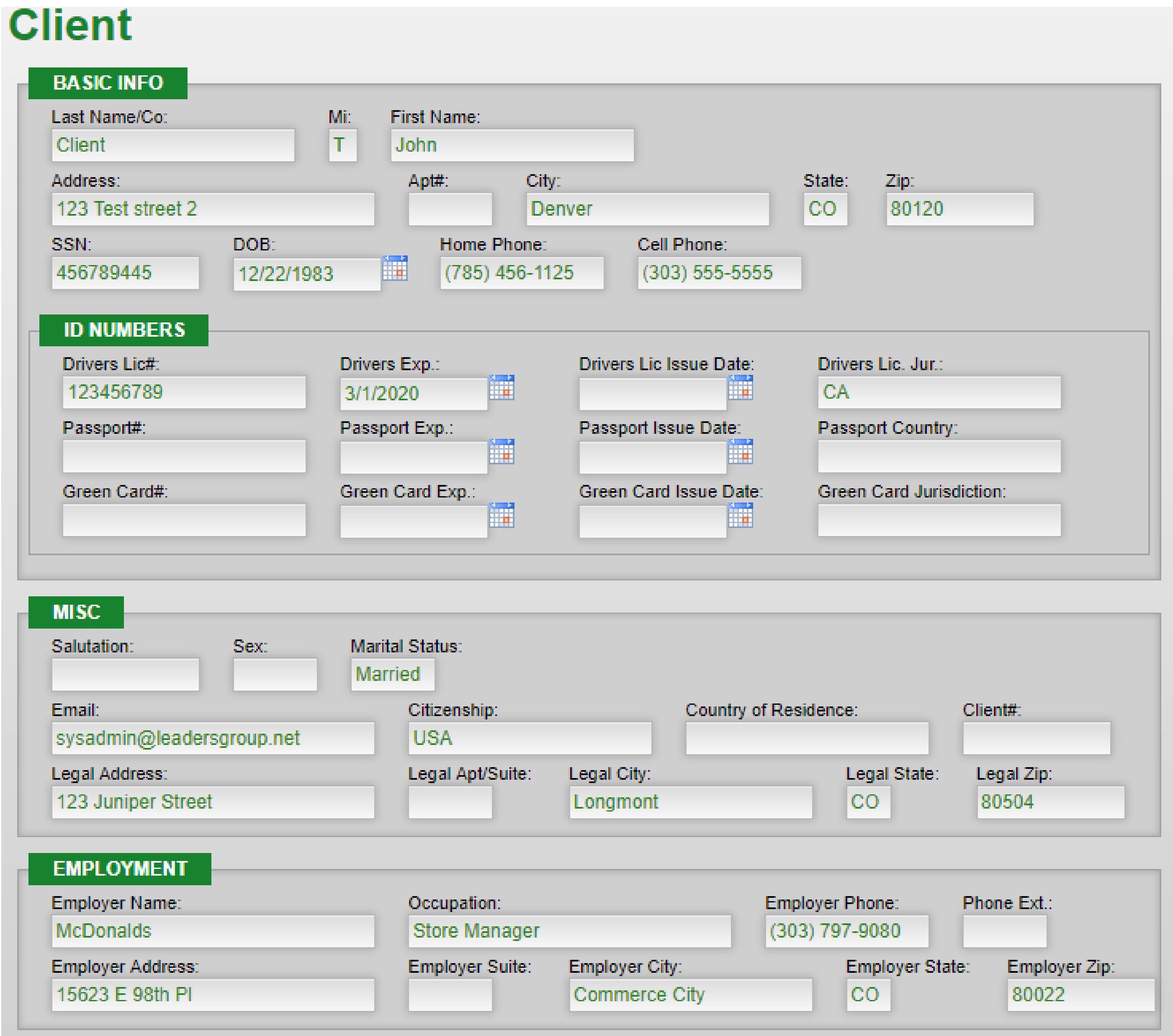
5. Once on the client record page, click on the “Launch LaserApp Anywhere” button (highlighted in yellow below).



6. After clicking “Launch Laserapp Anywhere”, Laserapp will launch and automatically log you in and populate the client information. To see the client information and make any necessary edits, click on “Client data” on the left hand side (highlighted in yellow below).



7. If any of the data on the Client Data screen is incorrect, this is where you can fix it. If it is all correct, there is nothing you will need to do on this step. Click on “dashboard” to go back to the previous screen.



Client

BASIC INFO

Last Name/Co: Client
Mi: T
First Name: John
Address: 123 Test street 2
Apt#:
City: Denver
State: CO
Zip: 80120
SSN: 456789445
DOB: 12/22/1983
Home Phone: (785) 456-1125
Cell Phone: (303) 555-5555

ID NUMBERS

Drivers Lic#: 123456789
Drivers Exp.: 3/1/2020
Drivers Lic Issue Date:
Drivers Lic. Jur.: CA
Passport#:
Passport Exp.:
Passport Issue Date:
Passport Country:
Green Card#:
Green Card Exp.:
Green Card Issue Date:
Green Card Jurisdiction:

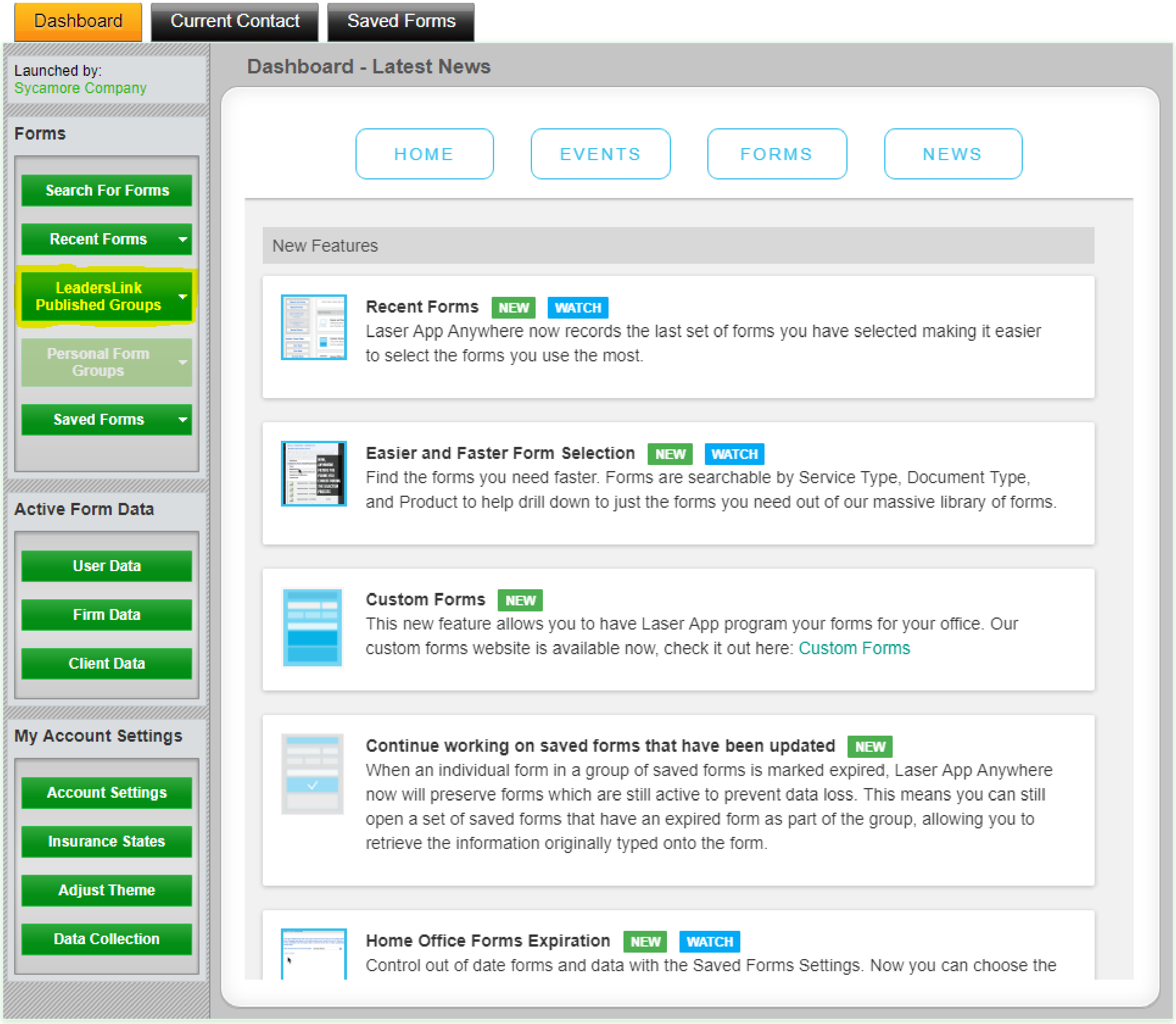
MISC

Salutation:
Sex:
Marital Status: Married
Email: sysadmin@leadersgroup.net
Citizenship: USA
Country of Residence:
Client#:
Legal Address: 123 Juniper Street
Legal Apt/Suite:
Legal City: Longmont
Legal State: CO
Legal Zip: 80504

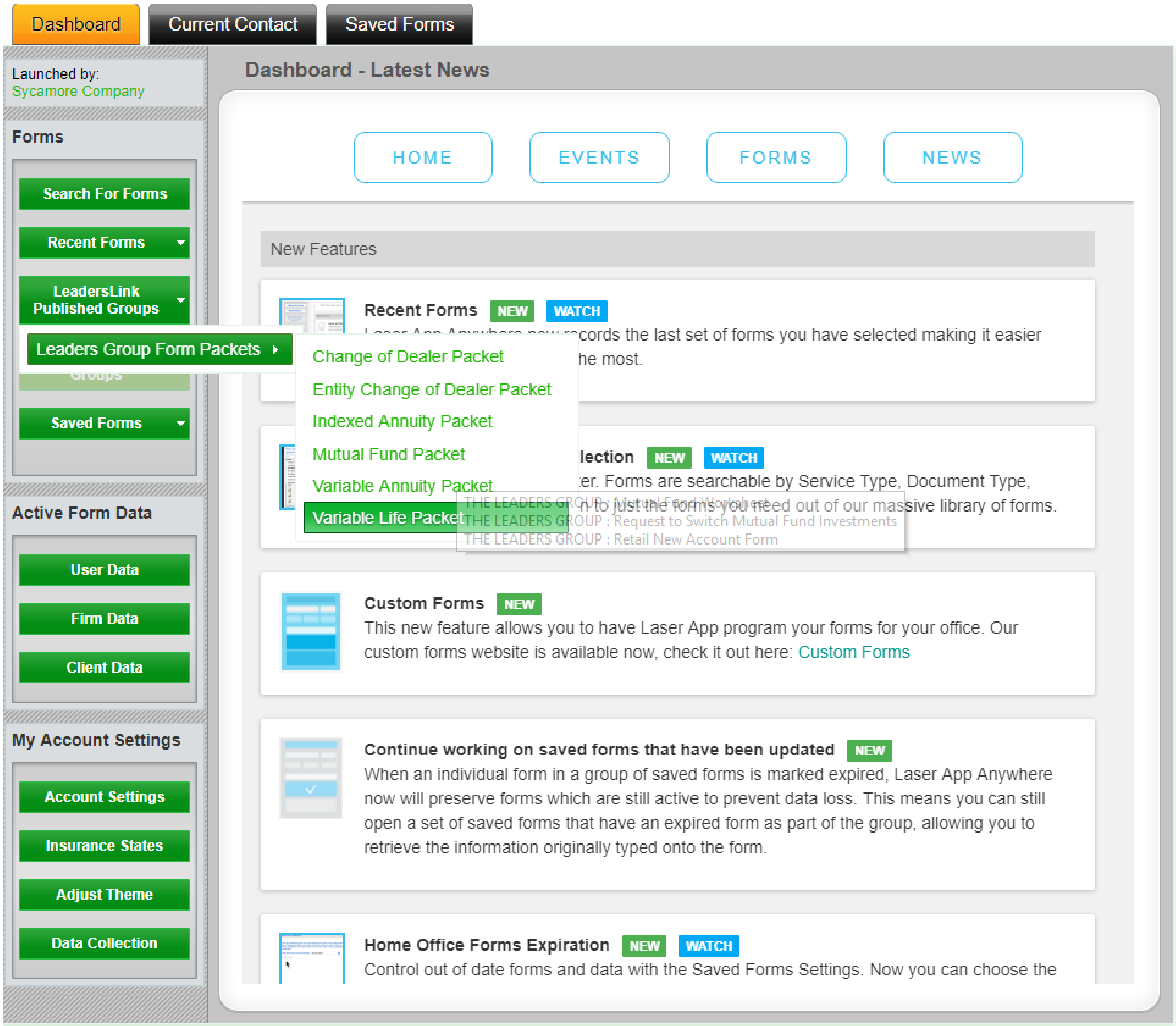
EMPLOYMENT

Employer Name: McDonalds
Occupation: Store Manager
Employer Phone: (303) 797-9080
Phone Ext.:
Employer Address: 15623 E 98th Pl
Employer Suite:
Employer City: Commerce City
Employer State: CO
Employer Zip: 80022

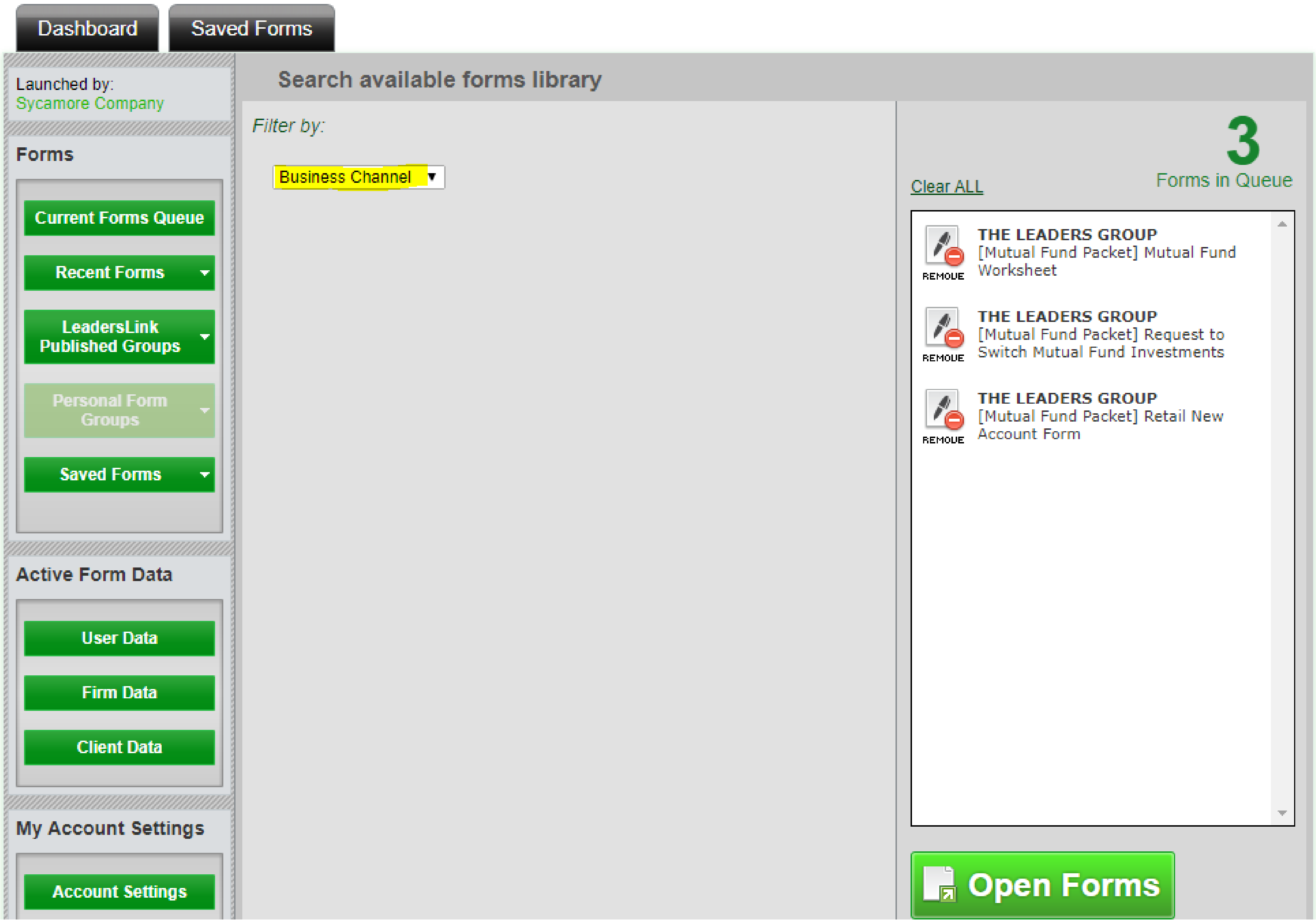
8. To view The Leaders Group form packets, click on "LeadersLink Published Groups"



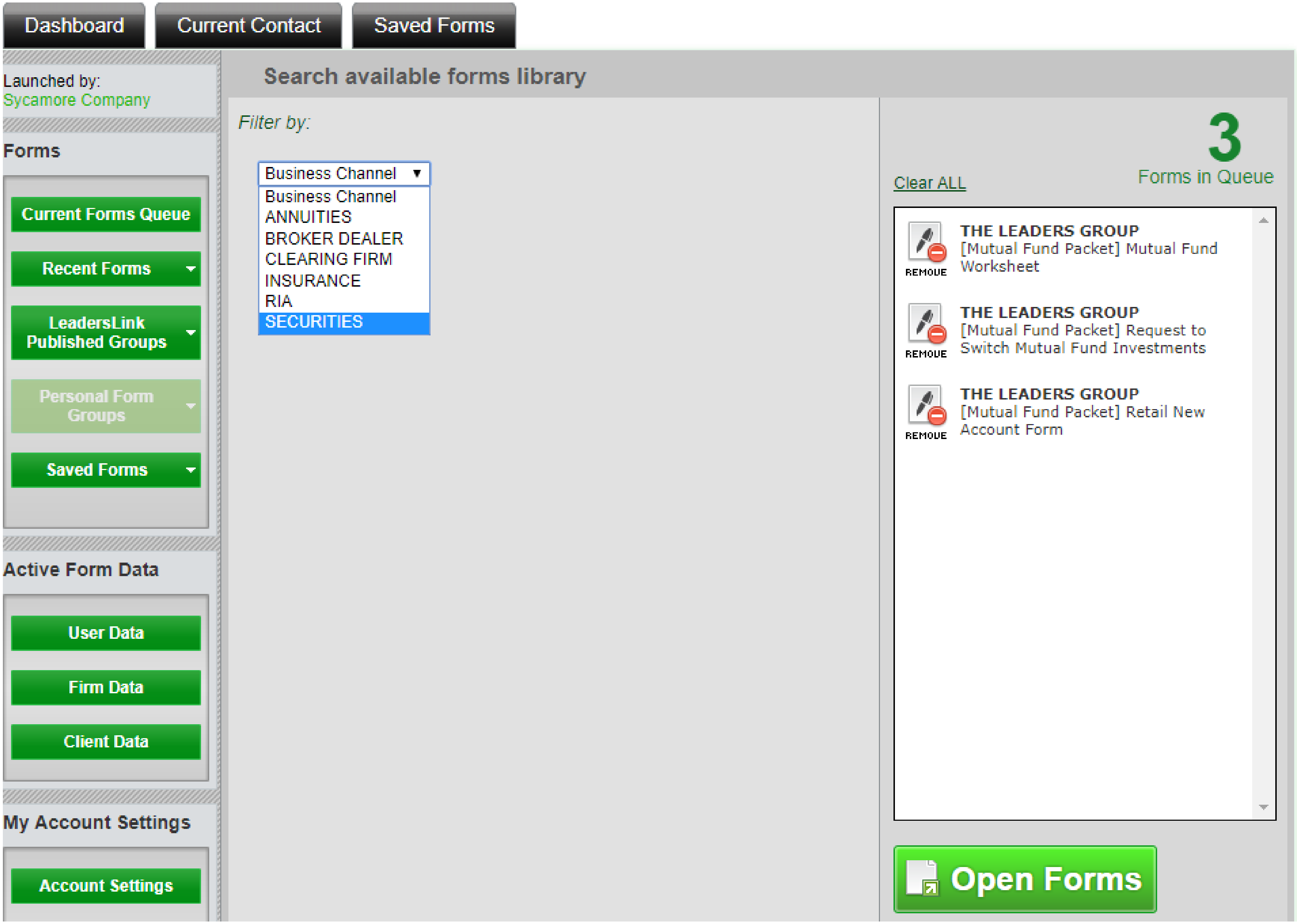
9. Select the form packet that suits your needs.



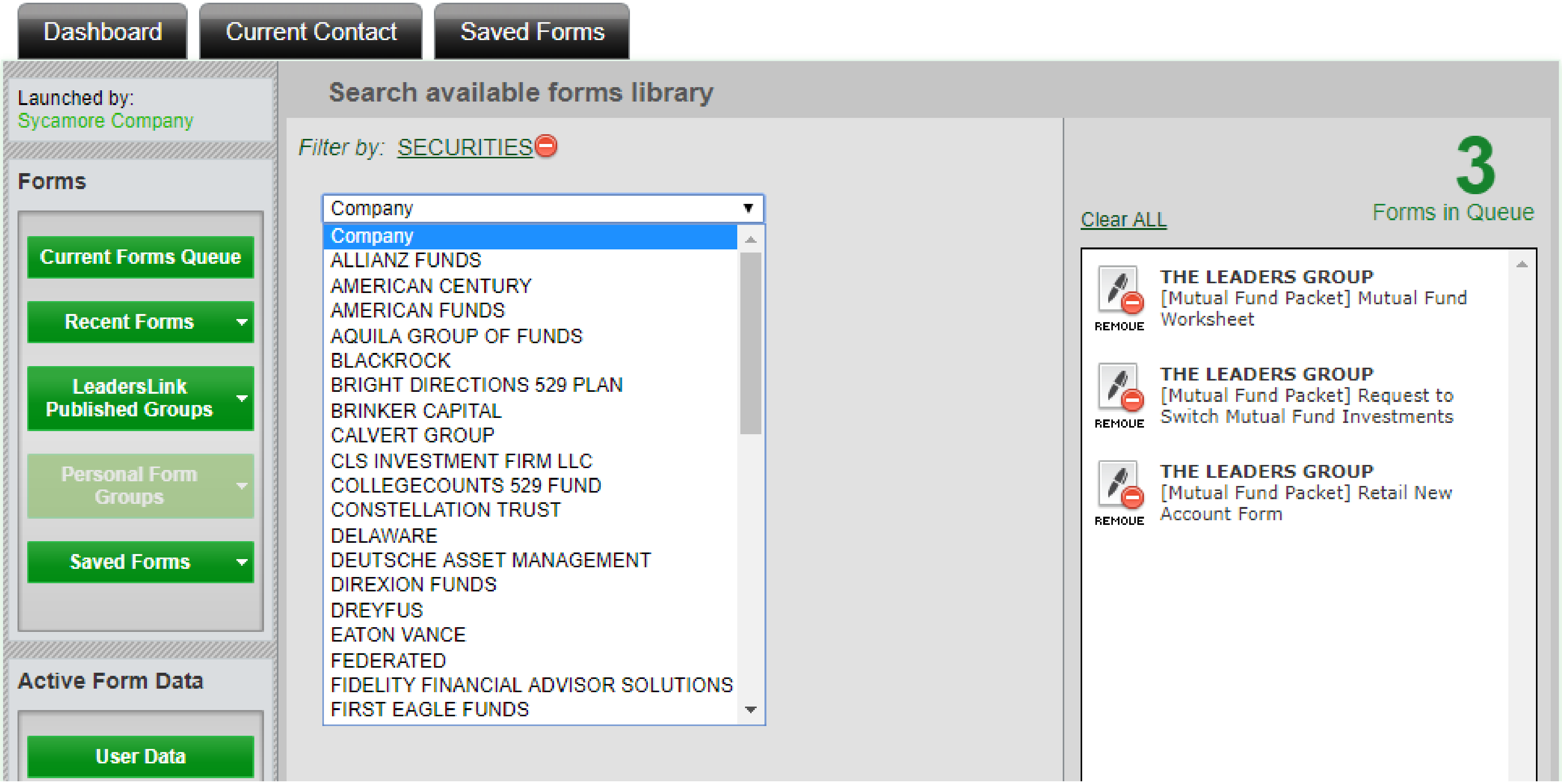
10. After you select the form packet, the forms in that packet will be put into the "Queue." To find a carrier, click on the "Business Channel" dropdown list.



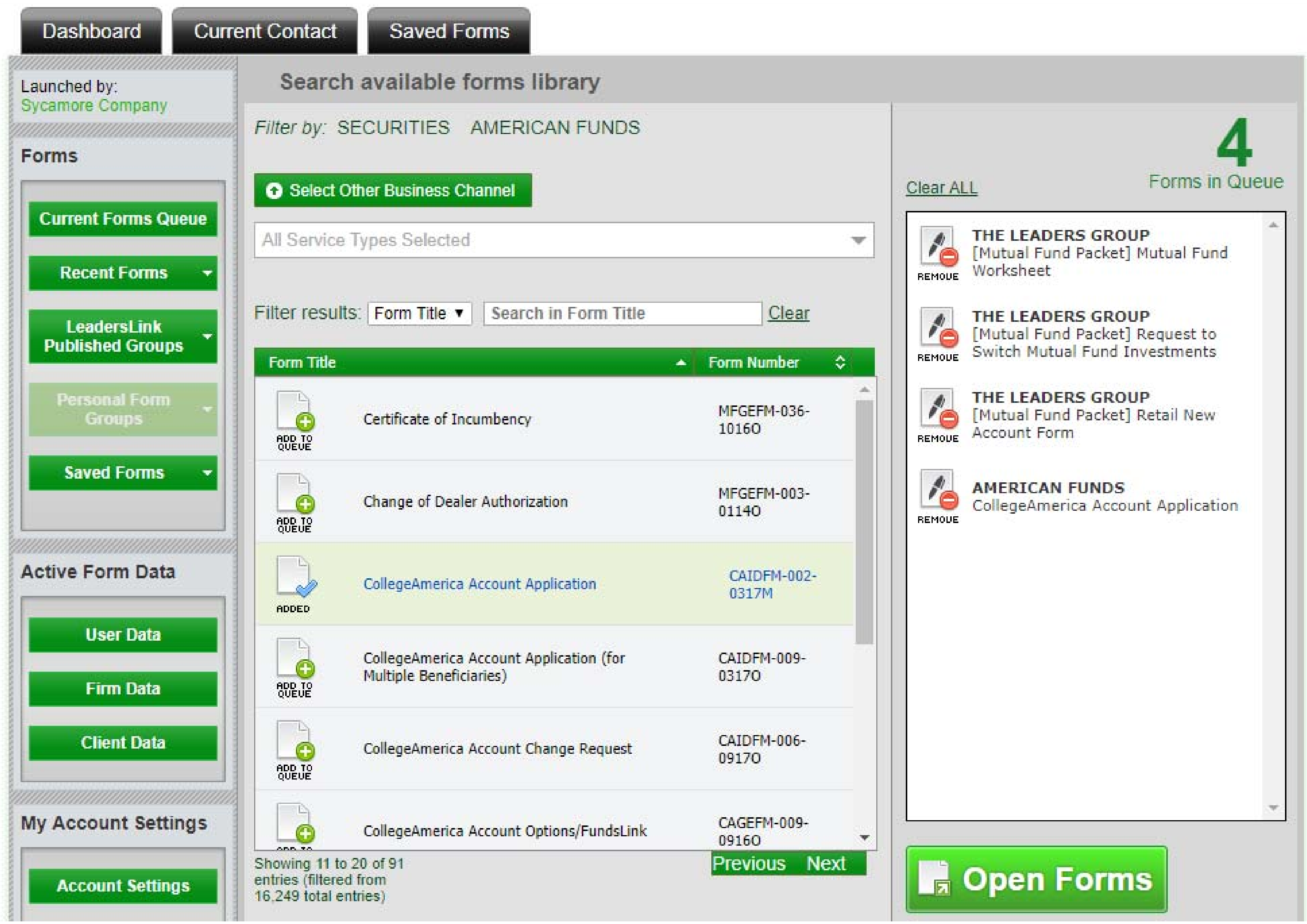
11. Select the appropriate Business Channel, and that filter will be applied.



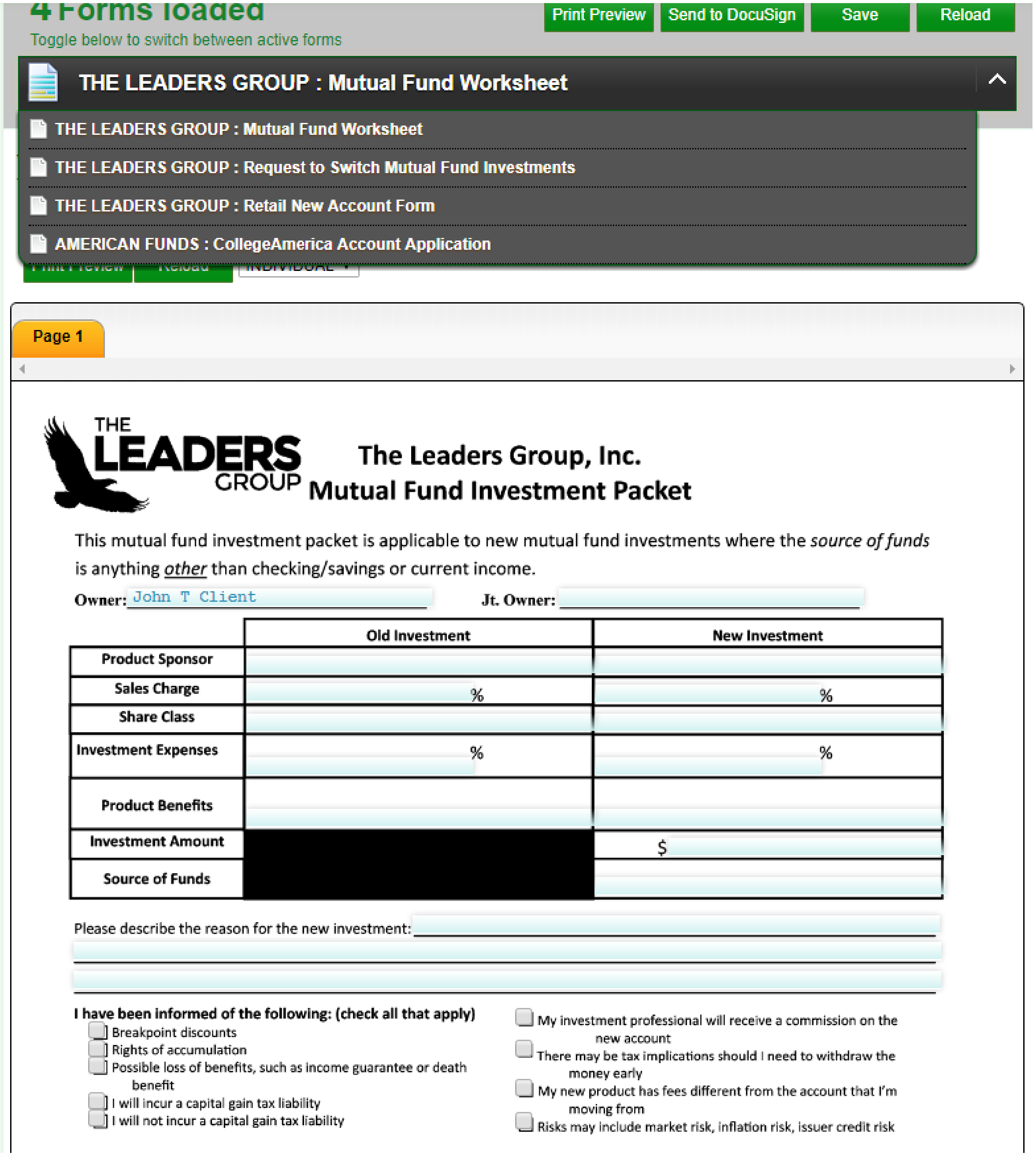
12. The companies associated with the Business Channel you selected will be available in the “Company” picklist. Once you select the company of choice, the forms available from that company will show below the filters.



13. There are 2 ways to find the form you are looking for. 1. Search for keywords in the form title. 2. Browse through all the available forms until you find the one you are looking for. To select the form and add it to the “Queue,” click on the green + sign to the left of the form title.



14. Assuming all the forms that are needed are in the “queue,” click “Open Forms.” The below image will show up. The drop down with the form title will allow you to navigate between forms.


4 Forms loaded

Toggle below to switch between active forms

Print Preview | Send to DocuSign | Save | Reload

THE LEADERS GROUP : Mutual Fund Worksheet

- THE LEADERS GROUP : Mutual Fund Worksheet
- THE LEADERS GROUP : Request to Switch Mutual Fund Investments
- THE LEADERS GROUP : Retail New Account Form
- AMERICAN FUNDS : CollegeAmerica Account Application

Page 1

THE LEADERS GROUP

The Leaders Group, Inc.
Mutual Fund Investment Packet

This mutual fund investment packet is applicable to new mutual fund investments where the *source of funds* is anything *other* than checking/savings or current income.

Owner: John T Client **Jt. Owner:**

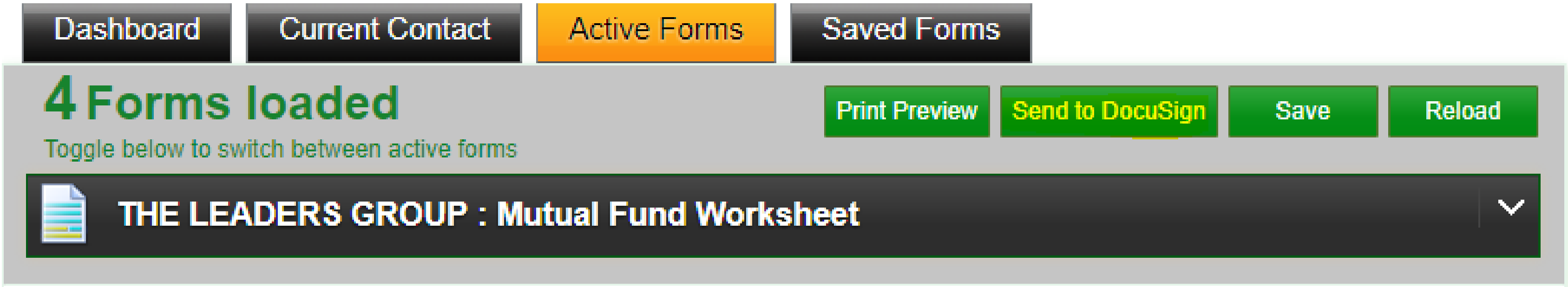
	Old Investment	New Investment
Product Sponsor		
Sales Charge	%	%
Share Class		
Investment Expenses	%	%
Product Benefits		
Investment Amount		$
Source of Funds		

Please describe the reason for the new investment:

I have been informed of the following: (check all that apply)

- ☐ Breakpoint discounts
- ☐ Rights of accumulation
- ☐ Possible loss of benefits, such as income guarantee or death benefit
- ☐ I will incur a capital gain tax liability
- ☐ I will not incur a capital gain tax liability
- ☐ My investment professional will receive a commission on the new account
- ☐ There may be tax implications should I need to withdraw the money early
- ☐ My new product has fees different from the account that I'm moving from
- ☐ Risks may include market risk, inflation risk, issuer credit risk

15. Once all of the information is input into the forms, click “Send to Docusign.”



15. After clicking “Send to Docusign,” the below image will display. Fill out the email subject and body first. Then, be sure to move the clients email to the 1st option under “Recipient list” To do this, click on the client email and click the green “up” button. Click “Ok” once finished and the forms will be sent via email to the client to sign. After the client signs the forms, they will then be sent to the Advisor automatically.