

LEADERS link

Update Bank EFT Information

Do you like getting paid for working with clients? Make sure your bank account is always up-to-date by utilizing the handy Home Office Request feature of LeadersLink! Follow the steps below, and keep the funds flowing.

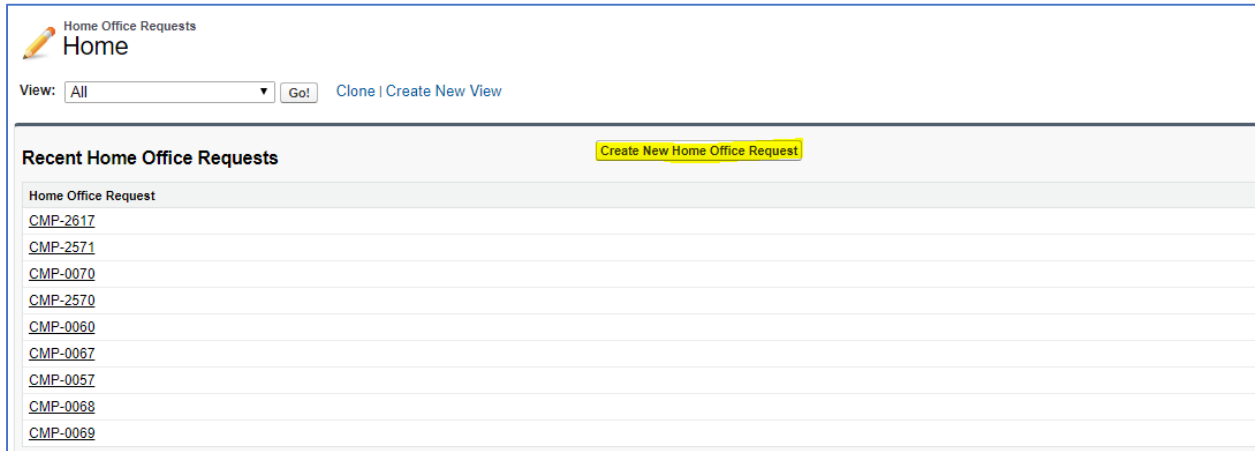
Step 1: Log in to Leaderslink (if you do not have a login, or do not know how to login, please reach out to support@leadersgroup.net)

Step 2: Navigate to the 'Home Office Requests' tab:

The screenshot displays the LeadersLink dashboard interface. The top navigation bar includes 'Home', 'Dashboards', 'Payout', 'Accounts', 'Home Office Requests' (highlighted), 'Compliance Approvals', and 'Books & Records Docs'. The main content area is titled 'Dashboard' and shows data as of 10/10/2017 2:24 PM. It features three tables: 'Compensation Overview', 'Compensation Activity', and 'Hold/Suspense Report'. The 'Compensation Overview' table shows zero values for various metrics. The 'Compensation Activity' table shows zero values for weekly, monthly, quarterly, and yearly net amounts. The 'Hold/Suspense Report' table shows a total of 0.00. Below these tables are sections for 'My Tasks' (no tasks scheduled) and 'Calendar' (no events scheduled for the next 7 days). A calendar widget for October 2017 is visible in the bottom right corner.

Compensation Overview		Compensation Activity		Hold/Suspense Report		
Beginning Balance:	\$0	Current Week (Net):	\$0	Client	Hold	Sum of Commission
Change Since Last Payout:	\$0	Previous Week (Net):	\$0		Reason	Gravide
Gross Commission Payable:	\$0	Month-to-Date (Net):	\$0	Total 0.00		
Less Amount On Hold:	\$0	Quarter-to-Date (Net):	\$0			
Net Commission Payable:	\$0	Year-to-Date (Net):	\$0			

Step 3: Once on the 'Home Office Requests' tab, click 'Create New Home Office Request':



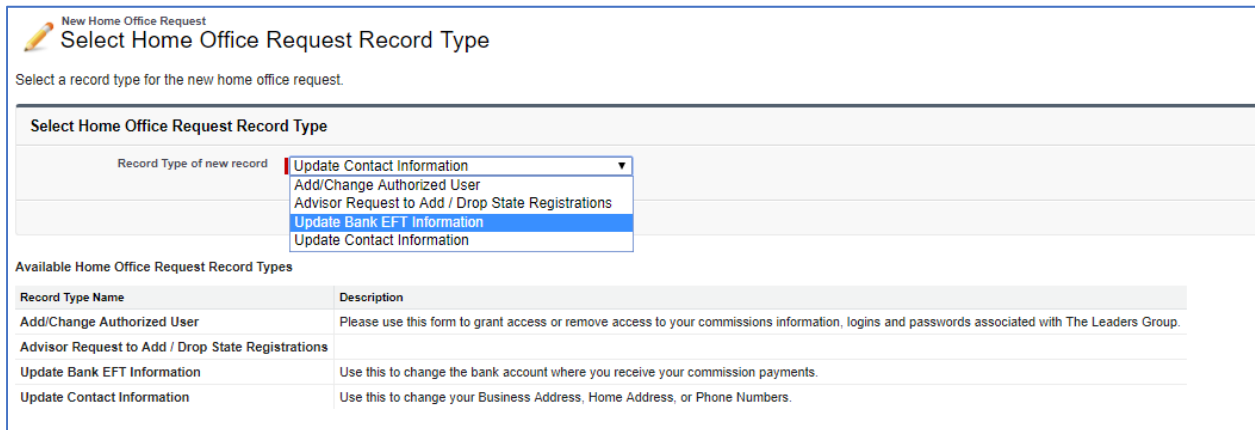
Home Office Requests
Home

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

Step 4: After the 'Create New Home Office Request' button is clicked, select the type of home office request you would like to submit, in this case "Update Bank EFT 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

- Update Contact Information
- Add/Change Authorized User
- Advisor Request to Add / Drop State Registrations
- Update Bank EFT Information**
- Update Contact Information

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.

Step 5: Once chosen, click 'continue'

Step 6: 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 [Red Bar] = Required Information

Advisor [Red Bar] [Magnifying Glass] Record Type Update Bank EFT Information

New Bank Information

Account Holder Name (personal acct only) [Red Bar] ABA/Routing Number [Red Bar]

Bank Name [Red Bar] Account Number [Red Bar]

Bank Branch City [Red Bar] Account Type [Red Bar] --None--

Certification

Voided Check Attached [Red Bar] []

FINRA Payment Certification [Red Bar] I understand that FINRA rules prohibit payment to anyone or any entity other than a registered person or entity. I certify that this account is under my personal social security number.

Advisor Signature [Red Bar]

Notes

Description [Red Bar]

[Save] [Save & New] [Cancel]

Step 7: Once the fields are filled out, click 'save'

Step 8: On the following screen, verify ensures the information is complete and accurate.

Step 9: Once all the information is filled out completely and correctly, click 'Submit for Approval'

Home Office Request CMP-4521 [Printable View]

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-4521 Record Type Update Bank EFT Information [Change]

Advisor Bill Advisor

New Bank Information

Account Holder Name (personal acct only) Bill Advisor ABA/Routing Number 123456789

Bank Name Bank of America Account Number 123456789000

Bank Branch City Denver Account Type Checking

Certification

Voided Check Attached [checked]

FINRA Payment Certification [checked] I understand that FINRA rules prohibit payment to anyone or any entity other than a registered person or entity. I certify that this account is under my personal social security number.

Advisor Signature Bill Advisor

Notes

Description

System Information

Created By Bill Advisor 11/3/2017 1:08 PM Last Modified By Bill Advisor 11/3/2017 1:08 PM

[Edit] [Delete] [Submit for Approval]

Notes & Attachments [New Note] [Upload Files]

No records to display

Approval History [Submit for Approval]

No records to display

Back To Top Always show me fewer / more records per related list

Step 10: 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-4521 Printable View

« Back to List: Home Office Requests

Notes & Attachments [0] | Approval History [2]

Home Office Request Detail Edit Delete

Home Office Request: CMP-4521 Record Type: Update Bank EFT Information [Change]

Advisor: [Bill Advisor](#)

New Bank Information

Account Holder Name (personal acct only): [Bill Advisor](#) ABA/Routing Number: 123456789

Bank Name: Bank of America Account Number: 123456789000

Bank Branch City: Denver Account Type: Checking

Certification

Voided Check Attached:

FINRA Payment Certification: I understand that FINRA rules prohibit payment to anyone or any entity other than a registered person or entity. I certify that this account is under my personal social security number.

Advisor Signature: [Bill Advisor](#)

Notes

Description

System Information

Created By: [Bill Advisor](#), 11/3/2017 1:08 PM Last Modified By: [Bill Advisor](#), 11/3/2017 1:08 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 1:08 PM	Pending	Registrations	Registrations		⏸ Pending
Approval Request Submitted						
	11/3/2017 1:08 PM	Submitted	Bill Advisor	Bill Advisor		

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