



Update Contact Information

Congratulations, you moved (or got a new phone, email, etc.)! Did you know failure to update The Leaders Group with your contact information could result in fines from FINRA? Using the Home Office Request functionality of Leaderslink, we have made it easy for you to let us know and ensure we all stay out of the regulatory crosshairs.

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

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

The screenshot displays the LEADERS link 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 divided into several sections:

- Dashboard:** Shows 'As of 10/10/2017 2:24 PM. Displaying data as Bill Advisor' and a 'Refresh' button.
- Compensation Overview:** A table with the following data:

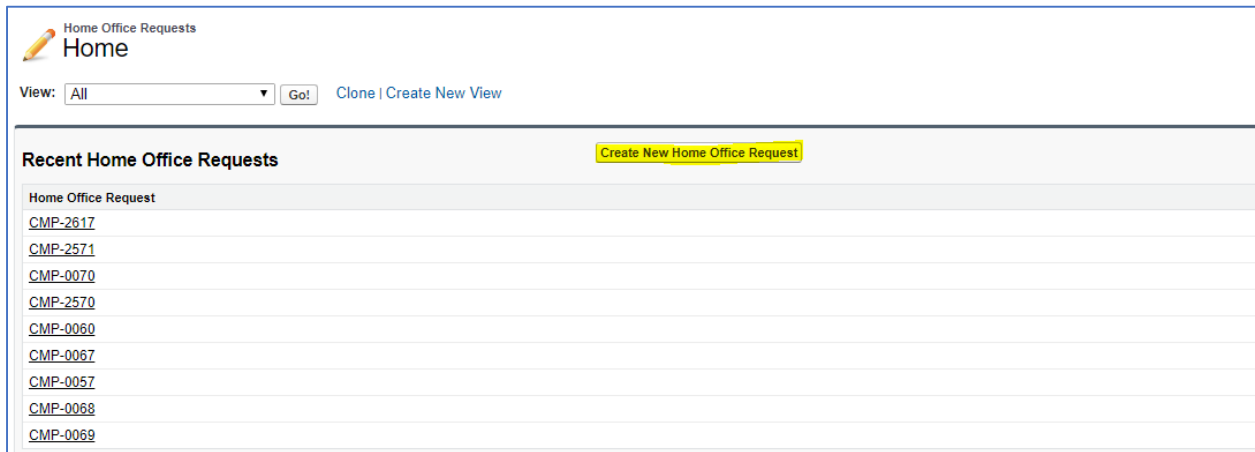
Beginning Balance:	\$0
Change Since Last Payout:	\$0
Gross Commission Payable:	\$0
Less Amount On Hold:	\$0
Net Commission Payable:	\$0
- Compensation Activity:** A table with the following data:

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:** A table with the following data:

Client	Hold Reason	Sum of Commission Granted
Total		0.00
- My Tasks:** A section with a 'New' button and a message: 'You have no open tasks scheduled for this period.'
- Calendar:** A section with a 'New Event' button and a message: 'You have no events scheduled for the next 7 days.'

The bottom right corner features a calendar for October 2017 and a user profile icon.

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



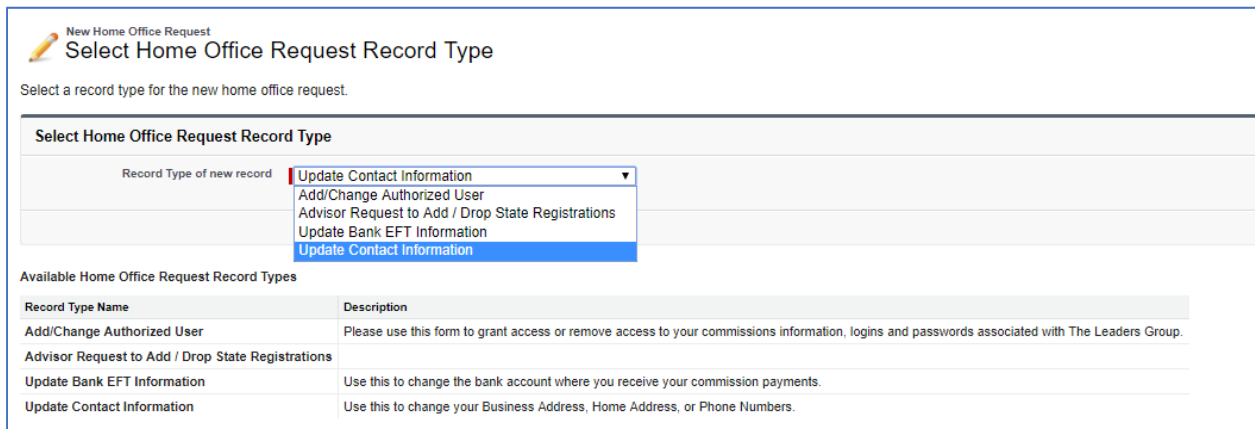
Home Office Requests
Home

View: All Go! 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 it is selected, 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:

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

Step 8: Once all the information is filled out completely and correctly, click 'Submit for Approval'

Step 9: 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](#) | [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

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 12:51 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)						
Approval Request Submitted	11/3/2017 12:51 PM	Pending	Registrations	Registrations		⏸ Pending
Approval Request Submitted	11/3/2017 12:51 PM	Submitted	Bill Advisor	Bill Advisor		

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