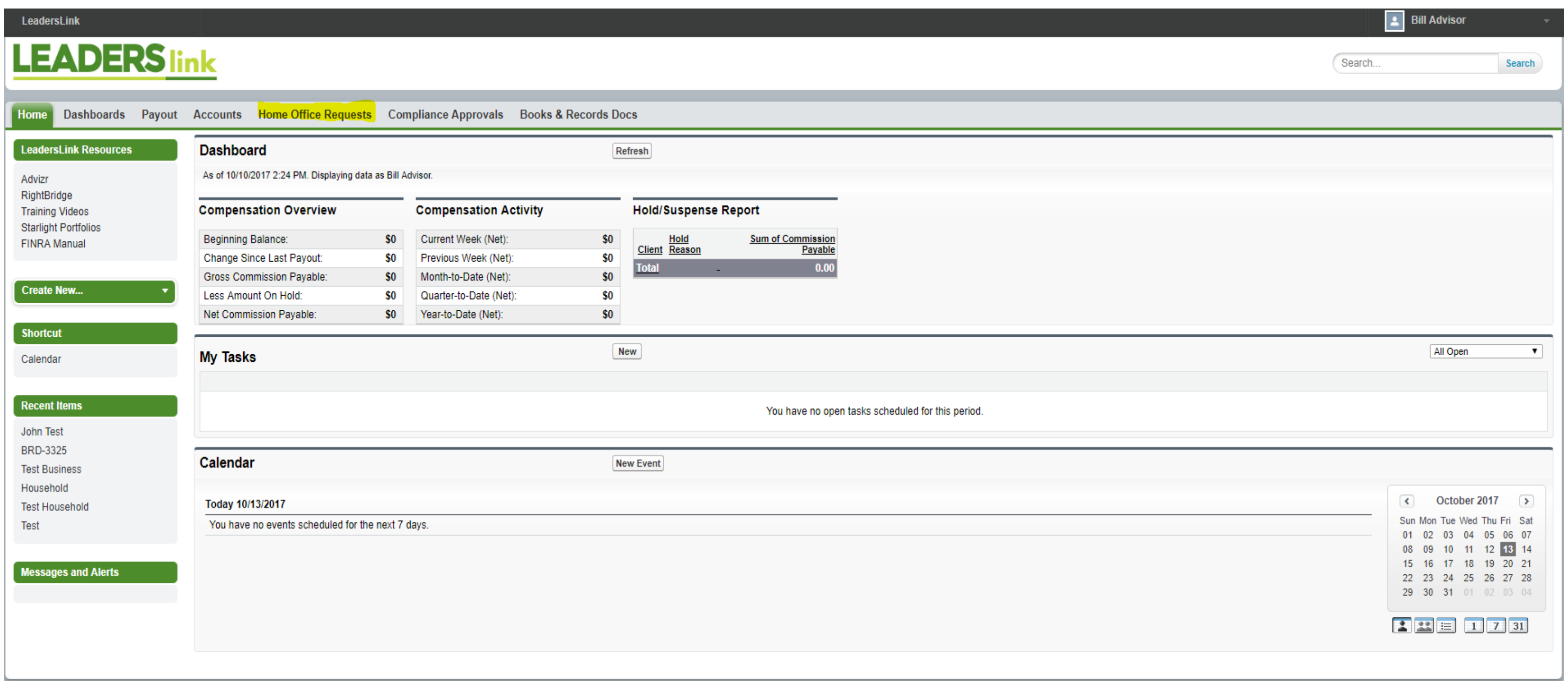
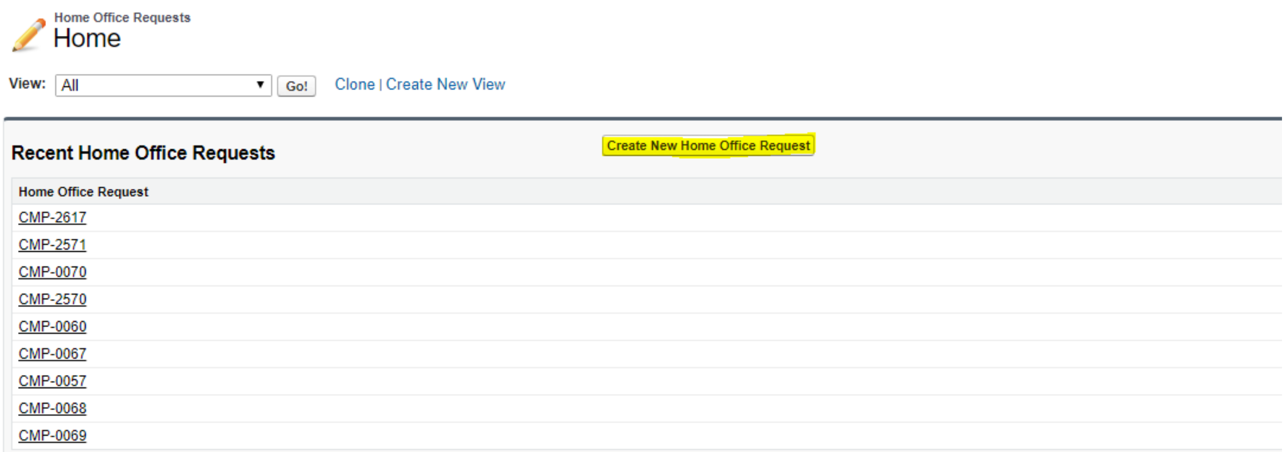
Do you like getting paid for working with clients? Make sure your bank account is always up-to-date by utilizing the handy Home Office Request feature of LEADERSLink! Follow the steps below, and keep the funds flowing.

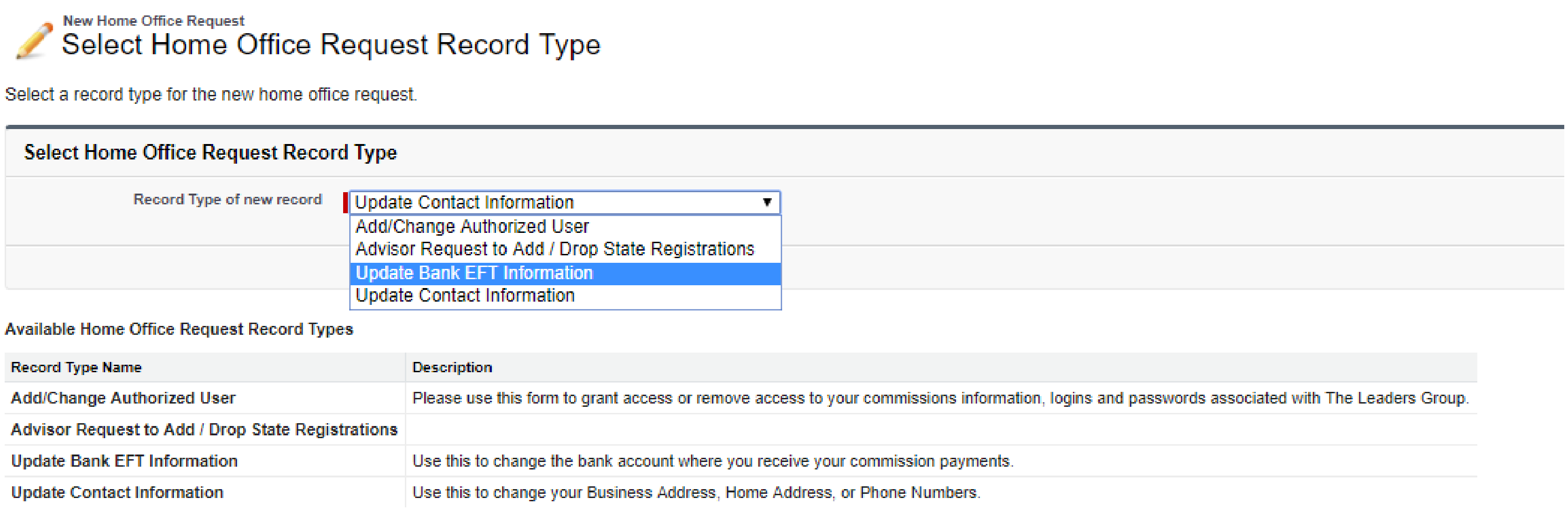
1. Log in to LEADERSlink
2. Navigate to the 'Home Office Requests' tab:



3. Once on the ‘Home Office Requests’ tab, click ‘Create New Home Office Request’:



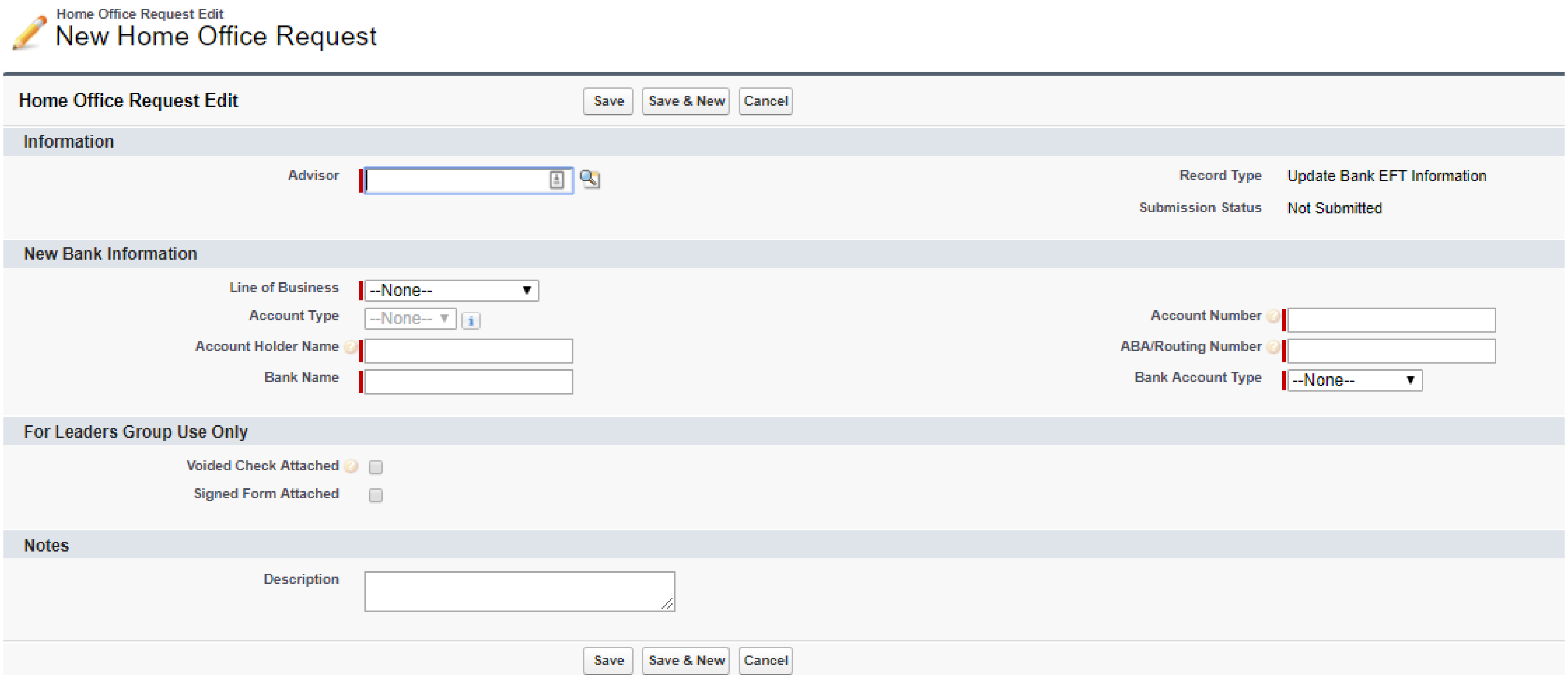
4. After the ‘Create New Home Office Request’ button is clicked, select the type “Update Bank EFT Information” of home office request you would like to submit:



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.

5. Once one is chosen, click ‘continue’

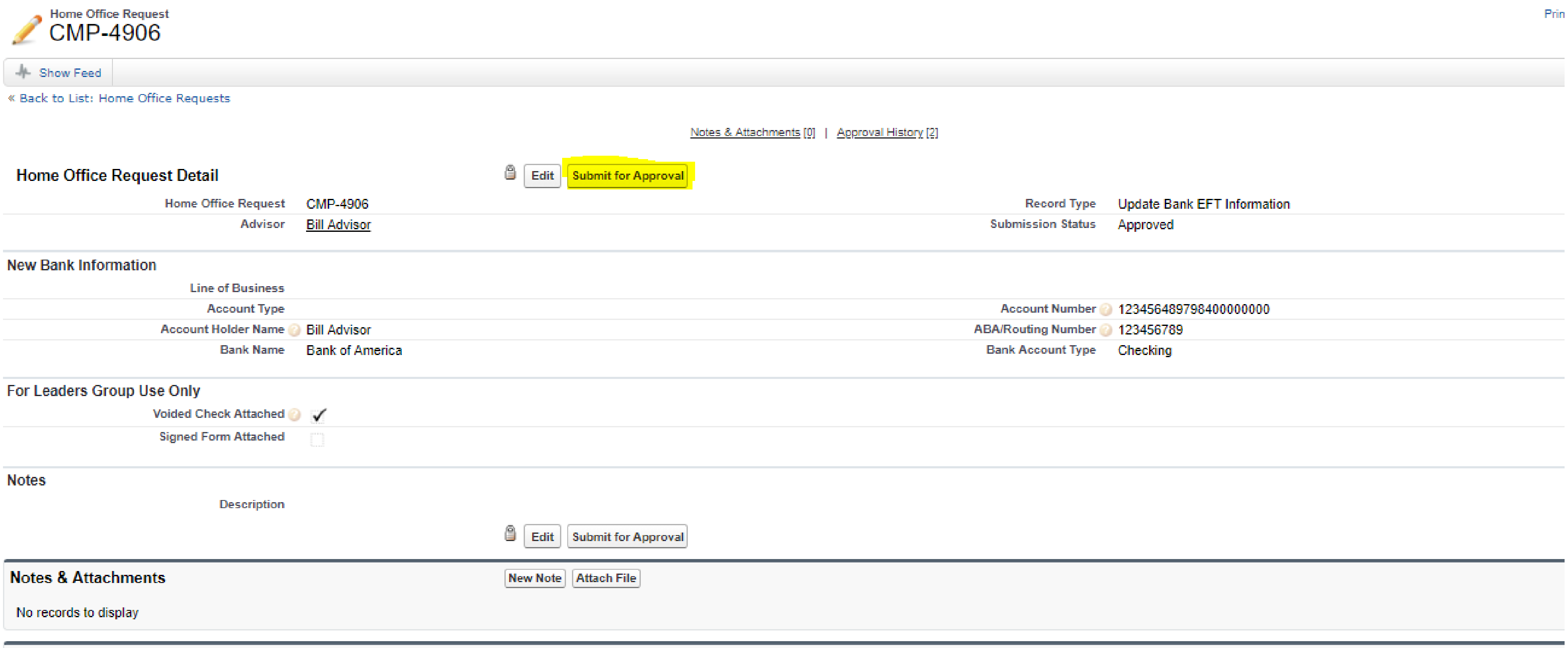
6. On the following screen that shows up, complete any information that you have, please keep in mind any field with a red bar next to them are required before moving on:



7. Once the fields are filled out, click 'save'

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

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



10. To check on the status of the request, scroll down to the ‘Approval History’ area to see where the request is at:

Show Feed

« Back to List: Home Office Requests

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

Home Office Request Detail Edit | Submit for Approval

Home Office Request	CMP-4906	Record Type	Update Bank EFT Information
Advisor	Bill Advisor	Submission Status	Approved

New Bank Information

Line of Business			
Account Type		Account Number	12345648979840000000
Account Holder Name	Bill Advisor	ABA/Routing Number	123456789
Bank Name	Bank of America	Bank Account Type	Checking

For Leaders Group Use Only

Voided Check Attached	✓
Signed Form Attached	☐

Notes

Description

Edit | Submit for Approval

Notes & Attachments New Note | Attach File

No records to display

Approval History Submit for Approval

Action	Date	Status	Assigned To	Comments	Overall Status
Step: Step 1					Approved
	2/22/2018 12:32 PM	Approved	Registrations		
Approval Request Submitted					
	2/22/2018 12:26 PM	Submitted	Bill Advisor		

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Always show me fewer ▲ / ▼ more records per related list

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