

Keeping It All Together



**By: Debbie Eppolito,
Senior Transition
Coordinator**



Welcome?

WE HAVE A NEW HIRE, SO MUCH TO DO!!

Where do I get the paperwork:

- ✓ InTouch
- ✓ Business Support
- ✓ Forms
- ✓ Compliance Forms
- ✓ Non Registered & Registered

Did we send an email to Debbie/Home Office with the following information:

- ✓ New Hires Name
- ✓ Target Date
- ✓ The Date Finger Prints Were Scheduled
- ✓ Request Set Up of an Email Address
- ✓ Advise Whether They are a Non Registered or a Registered Person

All Paperwork Received, All Forms Sent In, "Pre Hire" Reports and Finger Prints completed. If Explanations Are Required, Must Forward to Home Office for Review. Once Approved... IT'S OFFICIAL...

YOUR NEW HIRE CAN NOW BEGIN...



MY CHECKLIST

- Advise the Home Office who left
- Email Debbie at the Home Office as soon as you are aware of their departure
- Provide Term Date
- Email – Forward or Deactivate
- Take Off Website

These simple steps above will help the Home Office update our database!

PROCESS WHEN STAFF LEAVES THE OFFICE



Q: What... I can't do business without being appointed?

Q: Why... I need to SUBMIT business! I don't get paid if I don't have an appointment?

Q: How long will this take?

Q: Who is going to help me with this?

Breathe In... I've Got You Covered!

A: Correct! All appointment paperwork must be filled out and can be found via InTouch > Forms > Direct Business (listed in alphabetical order) It's an easy process... Print > Fill Out Form > Attach License > Sign and Send to Debbie

A: Once Appointed, Commissions can be received

A: Carriers can take between 5 – 7 business days

A: Once appointed, Debbie Eppolito will notify the rep via email with all of the info and the paperwork process can then begin!

Ready, Set, Go!!

VACATION TIME

- Did I notify Debbie at the Home Office via email?
- Did I provide the dates for when I'm leaving and returning?
- Did I set up proper coverage via email or cell ?
- Will I need the House Rep at the Home Office to cover me?
- IT'S ALL TAKEN CARE OFI DID THIS A WEEK BEFORE I LEFT!

TIME
TO
RELAX

- Changes
- Personal Info
- Address
- Phone



I THINK I HAVE EVERYTHING...

I NEED To STOP!

Did I forget to email Debbie at the Home Office
with the following:

- New Address
- New Phone Number

LET's Go Now... Everyone knows my new
location and phone number!!

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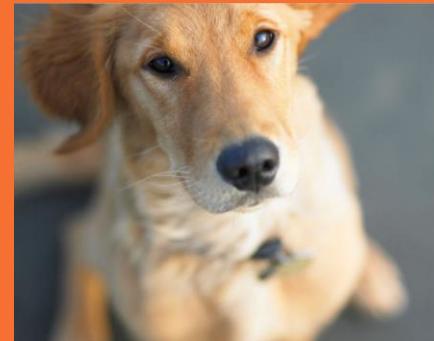
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A photograph of a workspace on a light-colored wooden desk. In the center is an open laptop with its screen facing away from the camera. To the right of the laptop is a white ceramic mug filled with dark coffee. In front of the laptop, a spiral-bound notebook with lined paper lies open, and a silver pen rests across it. Scattered around the laptop are several small, crumpled pieces of paper. The overall lighting is warm and natural.

Questions?