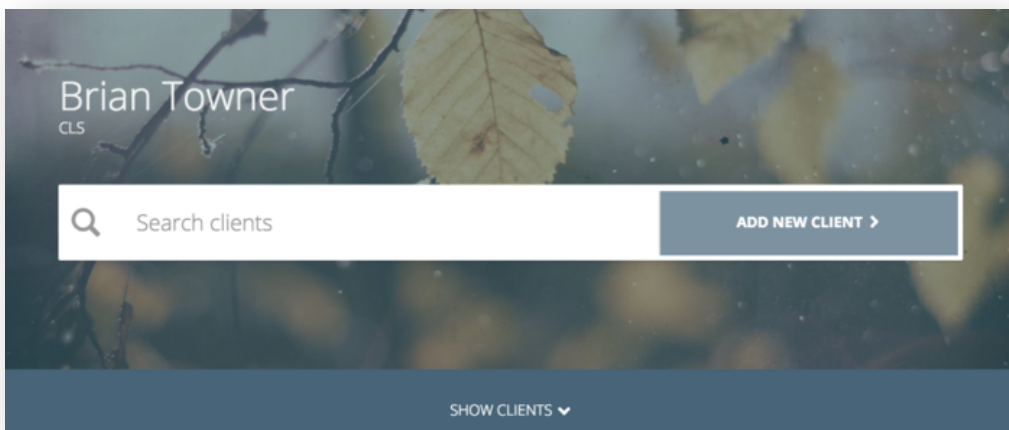
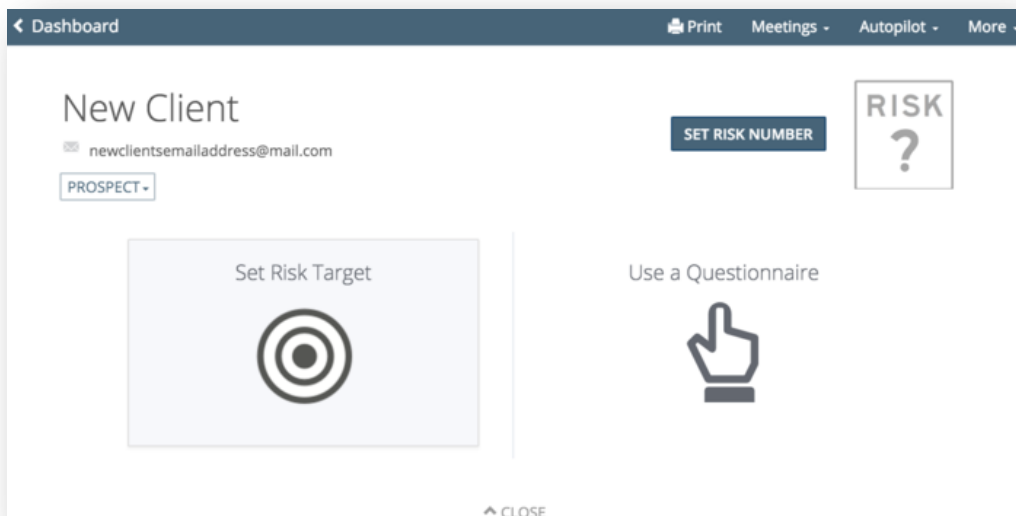


Advisor Driven Account Opening (Migration)

1. Log in to your advisor dashboard and search for the client you wish to migrate.
2. If the client doesn't exist within your dashboard, select "Add New Client". If the client already has a profile in your dashboard skip to step 4.



3. Input the clients email below their name and click "Set Risk Number". If you already have an indication of what your client's Risk Number is you can set their Risk Number manually. Otherwise, select "Use a Questionnaire" and email or launch the questionnaire for the client to complete.



- Once client name, email, and Risk Number have been input click "Autopilot" and "Migrate Account to Autopilot" on the upper right corner of their profile screen.

Dashboard Print Meetings Autopilot More

New Client

newclientsemailaddress@mail.com

PROSPECT

Migrate account to Autopilot...

JAN 28 · \$0

ACTIONS

RISK 70

GROWTH

- If the client has additional accounts within their profile, click "MIGRATE" next to the account you want to migrate. Otherwise select "Add New Account".
- Choose a model from the drop-down, then click "Generate Transfer Forms."

RISK 70 New Client

Migrate to Autopilot

CHOOSE AN ACCOUNT

RISK 43 Conservative Growth CLS

RISK 50 Moderate Conservative CLS

RISK 58 Moderate CLS

RISK 66 Moderate Growth CLS

RISK 74 Growth CLS

RISK 80 Aggressive Growth CLS

RISK 50 Moderate Conservative CLS

GENERATE TRANSFER FORMS

Choose Different Account

CLIENT APPROVAL

7. Once you select the registration type you'll have the option to send an email to your client or you can prepare the forms now. If an email is sent to your client, they will input their account owner information and e-sign the documents.

CHOOSE AN ACCOUNT ACCOUNT DETAILS **GENERATE TRANSFER FORMS** CLIENT APPROVAL

How should we gather this account's information?

Email a request to the client now or prefill the information yourself.

[Send Email to Client](#) [Prepare Forms Now](#)

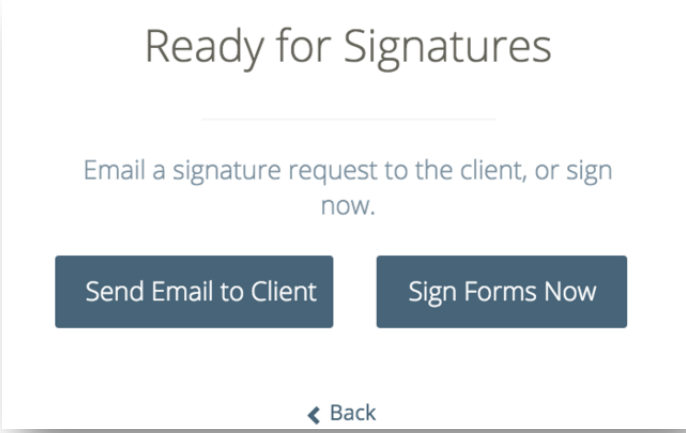
[← Back](#)

8. If you elect to send an email to your client your portion of the migration is complete.

Email Sent!

Your client should soon receive an email with a link they can use to finish opening this account. Once they've signed and submitted the application, you'll receive an email with e-signing instructions.

9. If you elect to prepare the forms now, you'll have the option at the end of the process to send an email to your client with completed documents for their review and signature. If the client is with you, your client can sign the documents directly from your advisor dashboard.



The screenshot shows a white rectangular box with a soft shadow. At the top, the text 'Ready for Signatures' is centered in a large, dark grey font. Below this, a horizontal line separates the title from the instructions. The instructions, 'Email a signature request to the client, or sign now.', are centered in a smaller, dark grey font. Below the instructions are two dark blue rectangular buttons with white text. The left button is labeled 'Send Email to Client' and the right button is labeled 'Sign Forms Now'. At the bottom center of the box is a small dark blue left-pointing arrow followed by the text 'Back'.

Once your client has reviewed and signed the documents, you'll receive an email with instructions to counter sign. Please view the [Advisor Driven Account Opening training video](#) for additional information.