

Advisor Transition Hub | Individual Transition View

Note: The grouping and default view for the task list is being refined.

1

Individual Transition View

View into the transition, which provides a full view into tasks, actions, reference information, and anything else Home Office associates need to manage the transition.

2

Transition Status

Track the “pulse” of the transition to flag for reporting and additional support.

3

Quick Actions

Actions are surfaced to help Home Office associates quickly navigate to heavily used content or actions.

4

Task Management

View the overall progress of the transitions and expand to view progress of individual workstreams (e.g., Licensing & Registrations).

The task list can be grouped and manipulated to fit the user’s preference.

5

Additional Tabs

Tabs like Notes and Training & Content provide areas to view more detailed information.

6

Overview Cards

Additional cards available within the Overview tab provide high-level reference information or quick actions to navigate / access information elsewhere (i.e., navigate to specific policies or process documents).