

Advisor Transition Hub | Prospect / Advisor Facing Experience

RAYMOND JAMES | Advisor Onboarding

Victor Irvin
victor.irvin@raymondjames.com
Target Join Date: 5/1/25

Dashboard My Tasks History

1 Welcome, Victor! Your Advisor Info Request is ready to complete. Complete it to kick-off the next step in the process. Start Advisor Info Request

2 Tasks

- Advisor Info Not Started
- Home Office Visit Not Started
- Financial Benefits Not Started
- Offer Letter Not Started
- Commit Not Started

Raymond James Recruiting Support Team

Name	Email	Phone
Sofia Drakotor	sofia.dra...@raymondjames.com	555-555-5555

4 What's Trending

Tim Keller It's never too late to start your career with us. Just ask Tim Keller.

Justin Krasner

RAYMOND JAMES | Advisor Onboarding

Advisor Information Request - ICD

General Information Business Mix Lending Review and Attestation Complete

General Information

Secretary* Sofia Drakotor

Are you part of a team?* Yes No # of Financial Advisors Team Name

FA First Name* FA Last Name* FA Personal Email Input BrokerCheck by FINRA

Current Firm* How many years have you been with your current firm?* How many years have you been in the industry? City* State* Zip Code*

Cancel Save Next

3 Links & Resources / Training

Revenue Engaged Sales Lead Revenue Engaged Sales Lead Revenue Engaged Sales Lead

The prospect's landing page is where they will go to complete asks from recruiters, track status of recruitment activities, and access RJ collateral.

1 Focus Actions

The prospect will quickly be able to see what's needed from them and access the next step to complete requests (e.g., AIR).

2 Status Tracking

The prospect can see where they are in the recruitment process and what's needed from them to complete.

3 Training, Content, "Hot Topics"

Proactively surface marketing materials, product overviews, or other resources to help the prospect make the decision to join Raymond James.

4 Trending Content

A feed will display Raymond James social content, news articles, and potentially testimonials for the prospect to see what's the latest at the firm.

5 Digital Information Gathering and Submission

Prospects will be able to provide information within a digital form, accessed from their portal.

Notifications will be sent to appropriate parties upon completion, including approval workflows where appropriate.

RAYMOND JAMES

Confidential // For Internal Use Only