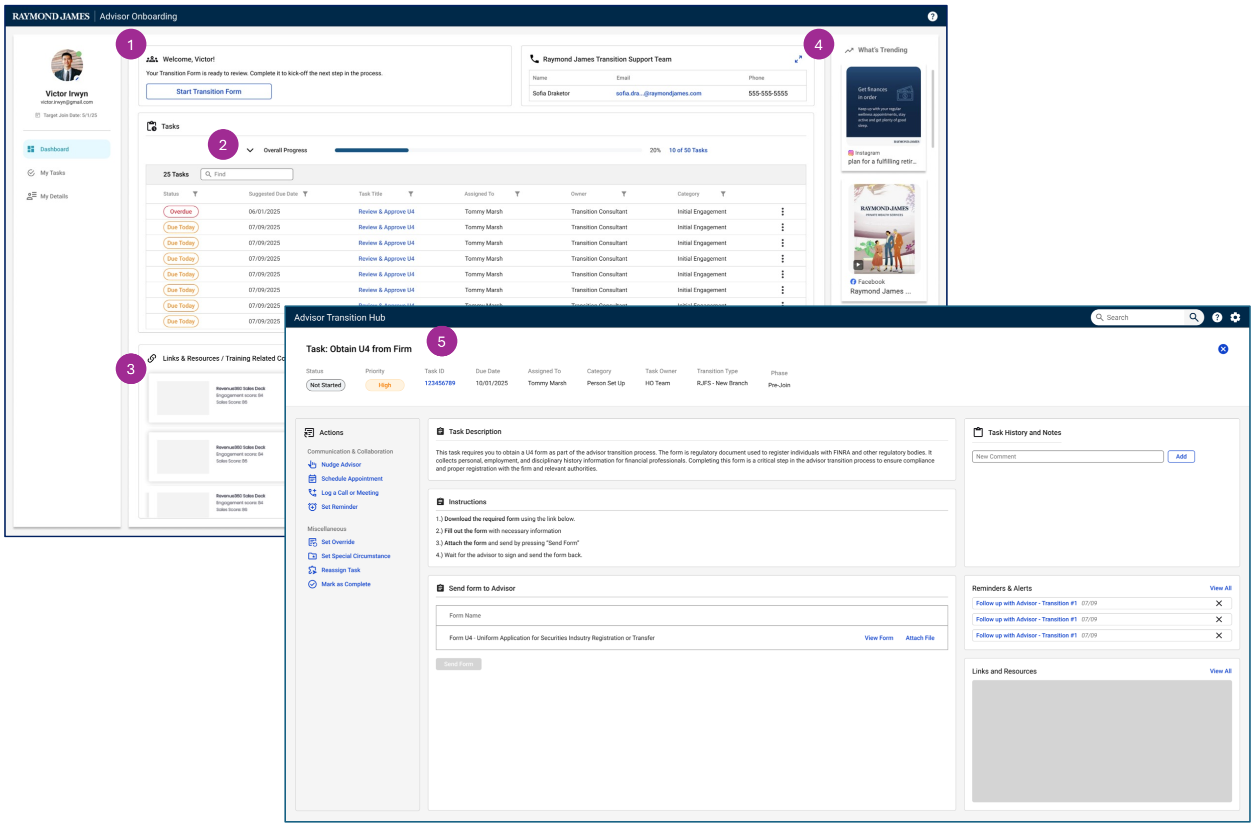
Advisor Transition Hub | Prospect / Advisor Facing Experience



After committing, the prospect's landing page will evolve into the transitions experience.

1. **Focus Actions**
   The prospect will quickly be able to see what's needed from them to continue progressing throughout the transition (e.g., approve the preliminary U4).

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**
   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. **Collaborate Task Management**
   Tasks will be collaborative between the Home Office and advisor. Task templates will dictate how they're completed (i.e., uploading a document, signing a form, etc.)