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isor Transition Hub

All TransitionsMy WorkspaceTravelReportsAdmin Console

Search

Q Search

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⚙️

MAN

Mary Wilson & Tom Thompson1234, 1876, 3341, 4567

100 Transitions

Search

Q Find

Status

All

Division

All

Join Type

All

Region

All

Target Join Date

All

☐ Strategic Transition

Apply

Export

Create Report

Summary for Current Search Results

Quick Filter

1 Pulse at Risk

1 Health at Risk

5 Escalations

1 Critical Milestone Overdue

2 Transitions Awaiting Response

Transition by Location

Expand

Overdue by Business Unit

RJ HR (3)33.00%

Supervision (3)33.00%

Registration (2)33.00%

Marketing00.00%

Transition Ops00.00%

Status

In Progress - Pre-Join (3)33.00%

Canceled (3)33.00%

Complete (3)33.00%

Merged (0)00.00%

On Hold (0)00.00%

Show More

Pulse	Overall Progress	Status	Transition Name	Target Join Date	Transition Type	Division	Lead Advisor	Consultant	Region	State	Privacy	# of Accounts
🟢	95%	In Progress	Transition #1	07/15/2025	New Advisor	RJA	Celia Wade	Tommy Marsh	Southeast	Mississippi	2	10,000
🔴	75%	In Progress	Transition #1	07/15/2025	New Advisor	RJA	Celia Wade	Tommy Marsh	Southeast	Mississippi	2	10,000
🟡	75%	In Progress	Transition #1	07/15/2025	New Advisor	RJA	Celia Wade	Tommy Marsh	Southeast	Mississippi	2	10,000
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- 1 Transitions Management Dashboard**  
Dashboard for day-to-day users to quickly access active and completed transitions. Badging helps surface transitions requiring attention.
- 2 Dashboard Filters**  
Filters are available to quickly narrow transitions down to by type, status, region, etc.
- 3 Transition List**  
View each transition, including supporting data to identify it and quickly understand progress or if any attention is needed.
- 4 Inline Actions**  
Quick actions related to specific transitions will be quickly accessible within the list (e.g., access ARC case).