Seamless No Sweat Transition

Minimal disruption means your clients continue with uninterrupted prosperity and so do you. We do the work and move the mountain so you don't have to in a three phases process:

Phase I

- Complete and return the Transition Questionnaire and Technology Questionnaire
- Set a target start date
- If allowable by your company's policy, begin gathering client statements
- We will offer assistance with a compliance-approved letter notifying clients about your move

Phase II

- Set up Pre-hire Training and Education Webinar. We will tailor training to your specific business model, be it advisory, brokerage, insurance or all three!
    - Set up technology and order stationary supplies
    - Review licenses and insurance appointments
    - Review products
    - Review transfer forms
    - Review Advisor website

Phase III

- Deliver your resignation letter to current or former broker/dealer
- Jump off! Welcome to Fellows Financial Group– we will make sure you and your staff are comfortable everything
    - Reappointments and licenses are requested and transferred to Fellows Financial Group
    - A representative number is assigned
    - Begin populating new account forms as well as change of dealer forms
    - Your biography, bio video and supporting brochures
    - A marketing plan to help you move and continue to grow
    - VoIP phone number and technology items (e-fax etc.) to help you transition to a paperless world