



User Guide

Efficient access to your
Quantum account information

Step 1

Login – Once you receive your welcome email, you can complete setup of your Advisor HQ account.

Visit ourcommunity.force.com

Step 2

Simply access and monitor the status of all of your applications, pending and completed, including any action items that require attention.

*To qualify for access to Advisor HQ, you must remain in good standing with Quantum and all appointed carriers.

Complete Account Registration

Click the link in your welcome email.
On your first sign-in you will be prompted to create your password.



Change Your Password

Enter a new password for **bkenvall@starlingfin.com.ahq**
Your password must have at least:

- 8 characters
- 1 letter
- 1 number

* New Password

* Confirm New Password

Change Password

Password was last changed on 10/25/2018 1:16 PM.



Change Your Password

Enter a new password for **bkenvall@starlingfin.com.ahq**
Your password must have at least:

- 8 characters
- 1 letter
- 1 number

* New Password

 Good

* Confirm New Password

 Match

Change Password

Password was last changed on 10/25/2018 1:16 PM.

Note: your username will be your email address with .ahq at the end.

Basic Navigation - Home Screen

My Business
 My Service Requests
 My Illustration Requests
 Carrier Links
 Report a Site Issue

Quick Links available on each page



Welcome Bonnie!

My Submitted Business (Last 30 Days)



Track past 30 days of business

Alerts

- Application Alerts: 5
- Service Request Alerts: 0

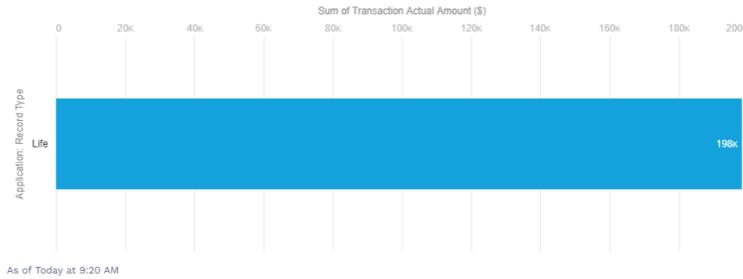
Advisor action is required

Ranking
 Annuity: Top 50%
 Life: Top 50%

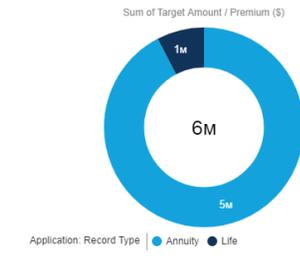
My Account Team:
 Contact Owner: [Phil Van Under](#)
 Annuity Marketer: [Phil Van Under](#)
 Life Marketer: [Vali Fertone](#)
 Annuity Account Manager: [Kelly Fife](#)
 Life Case Manager: [Life Underwriting](#)
 Life Sub-Marketer: [Nathan Kim](#)
 1-800-440-1088

Your Quantum team contact details

My Paid Business (Last 30 Days)



My Business by Type (YTD)



Business Summary

MY BUSINESS - PENDING

POLICY #	RECORD TYPE	RECEIVED DATE	ANNUITANT / INSURED FULL NAME
071289725	Annuity	8/6/2018	Eylandes, Chris
071292529	Annuity	9/26/2018	Hayes, Adman
1196015496	Annuity	9/28/2018	David, Christine
2889293W	Life	4/24/2018	Bree, Stephen
2889296W	Life	4/25/2018	Bree, Jennifer

Snapshot of recent activity

[View All](#)

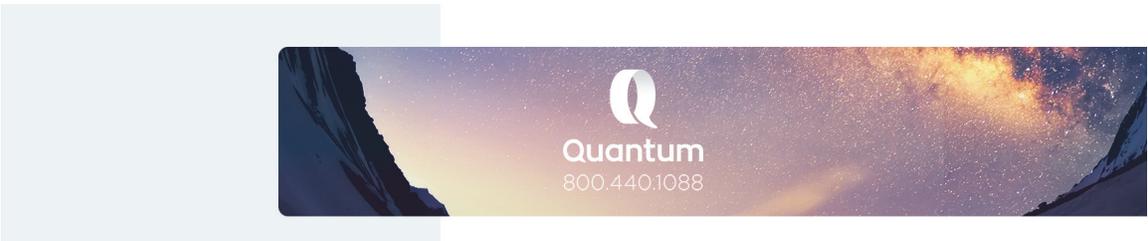
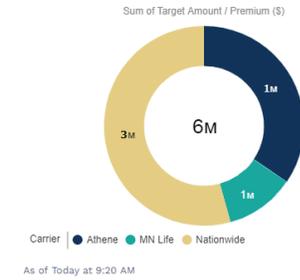
MY SERVICE REQUESTS - LAST 90 DAYS

SYSTEM ID	POLICY #	STATUS	ANNUITANT / INSURED FULL NAME
00042837	071280230	Complete	Webster, Mary
00042838	AA10937179	Complete	Webster, Craig
00043293	071037526	Complete	Young, Wayne

Click for more info

[View All](#)

My Business by Carrier (YTD)



My Business

Bonnie Kenvall ▾
[My Business](#) | [My Service Requests](#) | [My Illustration Requests](#) | [Carrier Links](#) | [Report a Site Issue](#)



Advisor Alert Urgency: ● High ● Normal ● Low
 Indicates urgency of alerts

Customize your page view

Applications
My Business - All ▾

50+ Items • Sorted by Advisor Alert • Filtered by all [unclear] minutes ago

Click header to sort by any field

ADVIS...	POLICY #	...	...	...	...	...	...	...	...	...	...	...	...
1 ●	071289726	...	...	...	...	...	...	...	...	...	...	...	...
2 ●	071292529	Annuity	9/26/2018	Hayes, Adman	56	Submitted/Pending	\$114,063.00	\$0.00	Nationwide	New Heights FIA 9			
3 ●	1196015496	Annuity	9/28/2018	David, Christine	54	Submitted/Pending	\$88,499.00	\$0.00	Nationwide	New Heights FIA 9			
4 ●	2889293W	Life	8/1/2018	Bree, Stephen	58	Pending	\$35,270.50	\$0.00	MN Life	Orion IUL			
5 ●	AA10149929	Annuity	8/6/2018	Christian, David	59	Submitted/Pending	\$542,815.00	\$0.00	Athene	Performance Elite 7			
6 ●	071280202	Annuity	6/19/2017	Webster, Mary	63	Paid	\$245,107.00	\$245,107.00	Nationwide	New Heights FIA 9			
7 ●	AA10937179	Annuity	6/19/2017	Webster, Craig	52	Paid	\$189,260.00	\$187,415.08	Nationwide	New Heights FIA 9			
8 ●	071037502	Annuity	6/19/2017	Young, Wayne	63	Paid	\$92,761.00	\$95,673.36	Nationwide	New Heights FIA 9			
9 ●	071253771	Annuity	6/19/2017	Wanster, Martin	63	Paid	\$82,907.00	\$83,633.79	Nationwide	New Heights FIA 9			
10 ●	071252037	Annuity	5/10/2017	Crane, Dave	73	Paid	\$25,532.00	\$45,322.00	Nationwide	New Heights FIA 9			

Click Policy # to view details (see next page)

Items noted as ● High require advisor intervention

Customize the layout of your My Business page by clicking the dropdown and making a new selection.

Applications
My Business - All ▾

LIST VIEWS

- My Business - Alerts
- ✓ My Business - All
- My Business - Cancelled/Declined
- My Business - Last 30 Days
- My Business - Last 60 Days
- My Business - Last 90 Days
- My Business - Paid
- My Business - Pending
- Recently Viewed

My Business - Policy Details

This page is accessed by clicking on the Policy # on your My Business page.

Policy #
071289726

Advisor / Agent
Bonnie Kenvall

Annuitant / Insured Full Name
Eylandes, Chris

Policy Owner

Advisor Assistance Needed
Low

Follow Up Date
10/19/2018

Received Date
8/6/2018

Submit Date
8/21/2018

Record Type
Annuity

Status
Submitted/Pending

Service Requests (0)

Applications (0)

Financial Information

Target Amount / Premium (\$) \$222,183.00

Transaction Actual Amount (\$) \$0.00

Funding Source
Transfer form to follow - TDA

Qualified

Product Information

Carrier
Nationwide

Product Name
New Heights FIA 9

Allocation Option
A Mozaic II

Income Rider

Death Rider

Access additional information by clicking View or Status (see next page)

Activities

COMM...	SUBJECT	ASSIGNED TO	DUE DATE	CREATED DATE	LAST MODIFIED...	LAST MODIFIED...
View	Status - Transfer Issue	CRM ADMIN		10/31/2018, 2:13 PM	10/31/2018, 2:13 PM	CRM ADMIN
View	Status - Suitability Approved	Phil Kim	2018-11-08	10/25/2018, 3:00 PM	10/25/2018, 3:00 PM	Phil Kim

View All

This information reflects the current Quantum details and information. Please contact your Quantum Account Manager with any questions or to update your personal information.



My Business - Policy Status

Access updates on the status of your policy by clicking either View or Status in the Activities section of the Policy page.

Click View to show details in a dialogue box

COMM...	SUBJECT	ASSIGNED TO	DUE DATE	CREATED DATE	LAST MODIFIED...	LAST MODIFIED...
View	Status - Transfer Issue	CRM ADMIN		10/31/2018, 2:13 PM	10/31/2018, 2:13 PM	CRM ADMIN
View	Status - Suitability Approved	Phil Kim	2018-11-08	10/25/2018, 3:00 PM	10/25/2018, 3:00 PM	Phil Kim

View All

10/29/18 - Per NW New business - We recently called North American to check the status of the Transfer of Assets to Nationwide account referenced above. Unfortunately, North American does not disclose information to Nationwide regarding transfers. Nationwide sent the transfer paperwork via Fed Ex on 10/19/18. We wanted to inform you of this information restriction. If you receive correspondence that requires action from Nationwide, please let us know.

Click Status to show same details in a page view (a new page will open)

COMM...	SUBJECT	ASSIGNED TO	DUE DATE	CREATED DATE	LAST MODIFIED...	LAST MODIFIED...
View	Status - Transfer Issue	CRM ADMIN		10/31/2018, 2:13 PM	10/31/2018, 2:13 PM	CRM ADMIN
View	Status - Suitability Approved	Phil Kim	2018-11-08	10/25/2018, 3:00 PM	10/25/2018, 3:00 PM	Phil Kim

View All

Quantum **ADVISOR HQ**

My Business My Service Requests Carrier Links

No related lists to display

Task Information

Related To: 07129-277 Status: Open

Assigned To: CRM ADMIN Priority: Normal

Subject: Status - Transfer Issue Public:

Comments

10/29/18 - Per NW New business - We recently called North American to check the status of the Transfer of Assets to Nationwide account referenced above. Unfortunately, North American does not disclose information to Nationwide regarding transfers. Nationwide sent the transfer paperwork via Fed Ex on 10/19/18. We wanted to inform you of this information restriction. If you receive correspondence that requires action from Nationwide, please let us know.

Activities

This information reflects the current Quantum details and information. Please contact your Quantum Account Manager with any questions or to update your personal information.

My Service Requests

Bonnie Kenvall ▾
[My Business](#) **[My Service Requests](#)** [My Illustration Requests](#) [Carrier Links](#) [Report a Site Issue](#)

Click here to access this page



Advisor Alert Urgency: ● High ● Normal ● Low

Indicates urgency of alerts

Customize your page view

Service Requests
My Service Requests - Last 30 Days ▾

Click header to sort by any field

8 items • Sorted by Advisor Alert • Filtered by all service

AD...	SYSTEM...	POLICY...	REASON	DATE/TIME OPENED	LAST MODIFIED DATE
1	00042837	071280230	Delivery Requirements	10/15/2018 9:13 AM	10/15/2018 9:13 AM
2	00042838	071280230	Delivery Requirements	10/15/2018 9:12 AM	10/15/2018 9:12 AM
3	00043293	AA10937179	Delivery Requirements	10/15/2018 9:11 AM	10/15/2018 9:11 AM
4	00044358	AA10141096	Delivery Requirements	10/15/2018 9:10 AM	10/15/2018 9:10 AM
5	00044357	071289725	Delivery Requirements	10/15/2018 9:09 AM	10/15/2018 9:09 AM
6	00044356	1196015496	Delivery Requirements	10/15/2018 9:08 AM	10/15/2018 9:08 AM
7	00044007	AA10149929	Delivery Requirements	9/24/2018 2:50 PM	9/27/2018 11:28 AM
8	00044006	071253771	Beneficiary Change	9/24/2018 2:49 PM	10/1/2018 1:49 PM

Click System ID to view details (see next page)

Items noted as ● High require advisor intervention

The System ID is not related to or necessary for policy communications. This is a unique number associated only with Advisor HQ.

Customize the layout of your My Service Requests page by clicking the dropdown and making a new selection.

Service Requests
My Service Requests - Last 30 Days ▾

- RECENT LIST VIEWS
- My Service Requests - Alerts
 - ✓ My Service Requests - All
 - My Service Requests - Closed
 - My Service Requests - Last 30 Days
 - My Service Requests - Last 60 Days
 - My Service Requests - Last 90 Days
 - My Service Requests - Open
 - My Service Requests - Rejected/NIGO
 - Recently Viewed

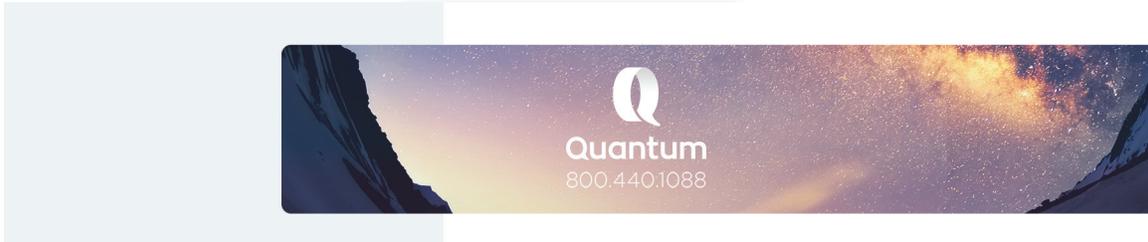
My Service Requests - Details

This page is accessed by clicking on the System ID on your My Service Requests page.

The screenshot shows the user interface for a service request. At the top, the user is identified as Bonnie Kenvall. The navigation menu includes 'My Business', 'My Service Requests' (highlighted), 'My Illustration Requests', 'Carrier Links', and 'Report a Site Issue'. The main header features the Quantum Advisor HQ logo over a background image of hikers on a mountain peak. The service request details are organized into sections:

- Contact Information:** Contact Name (Bonnie Kenvall), Contact Phone ((866) 445-6666), Contact Email (bkendall@rrpfinancial.com), Reason, and Delivery Requirements.
- Advisor Assistance Needed:** Follow Up Date (7/20/2018), Status (Complete), Date/Time Opened (7/17/2018 4:39 PM), and Date/Time Closed (7/17/2018 4:39 PM).
- Application Information:** Policy # (071280230), Carrier (Nationwide), Annuitant / Insured Full Name (Webster, Mary), and Policy Holder Name.
- Description Information:** Subject (Delivery Requirements). A callout box points to this section with the text: "Notes and alerts regarding your service request are located under Description Information".
- Activities:** A table showing a 'Follow Up' activity assigned to 'CRM ADMIN' on 10/04/2018, 9:41 AM, with a last modified date of 10/05/2018, 10:00 AM by Kristin King.

A message at the bottom of the screenshot states: "This information reflects the current Quantum details and information. Please contact your Quantum Account Manager with any questions or to update your personal information."



My Illustration Requests

Bonnie Kennall ▾
[My Business](#) [My Service Requests](#) **My Illustration Requests** [Carrier Links](#) [Report a Site Issue](#)

Click here to access this page



Click here to request new life and annuity illustrations

Advisor Alert Urgency: ● High ● Normal ● Low

Indicates urgency of alerts

New

Customize your page view

Illustration Requests
My Illustration Requests - Last 30 Days ▾

8 Items • Sorted by Advisor Alert • Filtered by all services

seconds ago

Click header to sort by any field

Search this list...

AD...	SYSTEM...	POLICY...	INSURED ...	POLI...	REASON	DATE/TIME OPENED	LAST MODIFIED DATE
1	00042837	071280230			Delivery Requirements	10/15/2018 9:13 AM	10/15/2018 9:13 AM
2	00042838	071280230	Complete	Webster, Mary	Delivery Requirements	10/15/2018 9:12 AM	10/15/2018 9:12 AM
3	00043293	AA10937179	Complete	Webster, Craig	Delivery Requirements	10/15/2018 9:11 AM	10/15/2018 9:11 AM
4	00044358	AA10141096	Complete	Young, Wayne	Delivery Requirements	10/15/2018 9:10 AM	10/15/2018 9:10 AM
	00044357	071289725	Complete	Eylandes, Chris	Delivery Requirements	10/15/2018 9:09 AM	10/15/2018 9:09 AM
	00044356	1196015496	Complete	David, Christine	Delivery Requirements	10/15/2018 9:08 AM	10/15/2018 9:08 AM
	00044007	AA10149929	Complete	Christian, David	Delivery Requirements	9/24/2018 2:50 PM	9/27/2018 11:28 AM
	00044006	071253771	Complete	Wanster, Martin	Beneficiary Change	9/24/2018 2:49 PM	10/1/2018 1:49 PM

Items noted as High require advisor intervention

Click System ID to view details (see next page)

The System ID is not related to or necessary for policy communications. This is a unique number associated only with Advisor HQ.

Customize the layout of your My Illustration Requests page by clicking the dropdown and making a new selection.

Illustration Requests
My Illustration Requests - Last 30 Days ▾

LIST VIEWS

- All
- My Illustration Requests - All
- My Illustration Requests - Cancelled
- My Illustration Requests - Closed
- ✓ My Illustration Requests - Last 30 Days
- My Illustration Requests - Last 60 Days
- My Illustration Requests - Last 90 Days
- My Illustration Requests - Pending
- Recently Viewed (Pinned list)

Carrier Links

Click here to access this page

Carrier Links

Report a Site Issue

American Equity
American General
American National
Ameritas
Athene
Baltimore Life
Delaware Life
Fidelity and Guaranty
Global Atlantic
Great American
Legacy
Lincoln Financial Group

Minnesota Life
My Annexus
National Guardian
National Life Group
National Western
Nationwide
North American
One America
Pacific Life
Protective
Security Benefit
Symetra

Clicking a link will open the carrier's site in a new window. You will need your personal login and password for that site.

Resetting Password

ADVISOR HQ

To access this page, you have to log in to Advisor HQ.

Username 1 Saved Username
bkenvall@starlingfin.com.ahq

Password
.....

Log In

Remember me

Forgot Your Password?

When logging in, click Forgot Your Password?

ADVISOR HQ

Forgot Your Password

To reset your password, enter your username.

Username
bkenvall@starlingfin.com.ahq

Cancel Continue

Enter Username then check your email and follow instructions provided

Note: Your username will be your email address with .ahq at the end.

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