



First Appointment Triage

	Group 1	Group 2	Group 3	Group 4	Group 5
Intermountain	ML TW BW	JM ZG LH	NC BA AA TS JS TA	JK RG	KB AF TG RE TL
ARUP	LH ML	KB TS TA JS	NC BA AA	ZG	AF JK TG RG JM BW RE TW
School District/City	TW	TS TA JS	NC BA AA	JK	KB AF TG ZG RG LH JM BW RE
Senior Benefits	TW ML ZG	BW JM LH	AF NC BA AA TS JS TA	JK	KB TG RG RE
Adobe	RE	ML	AF NC BA AA TS JS TA	JK	KB TG ZG RG LH JM BW TW
Menlo	ZG, BA	ZC, ML			
YouTube Podcast FC/RN/ZY	DJ to sort after intro calls				
Client	Client Requested Advisor	Advisor Mentioned	SRV of Referring Client		

Other Referral Codes

RD	Rustin Diehl
R1	Klea Harris
RC	Rick Clayton
LI	Lindsay Hadley
GL	Non-IHC from Greg Lyle
GI	IHC from Greg Lyle
KA	Katrina Bourne
CF	Capita Financial
SA	Smart Asset
MO	Menlo <small>*MO SRC always includes LI Shared SRC</small>
CW	Curated Wealth/Susan Moffat <small>*CW SRC always includes LI Shared SRC</small>
ST	Sam Taggart <small>*ST SRC always includes LI Shared SRC</small>
FC	The Financial Call
RN	The Retirement Nerds
NW	Nerd Wallet
BS	Braiden Shaw
ZY	Zacc Youtube - Money Education
RR	Return & Rise

Checkbox Segmentations

Connector	Consistent client referrals
Recruiting Partner	They help us recruit employees
Employer Group	We present to their companies
Affluent Women	Affluent women that should be invited to any future women focused events, are high net worth, etc.
Private Offerings	We check the box when they are eligible for Private Offerings due to their net worth or income.

Senior Benefits Codes

SB	General presentation opportunities we got from their connections
S1	Trenton Olson
S2	Matt Gibson
S3	Brent Katter
S4	Chandler Olson
S5	Phillip Pay
S6	
S7	Erik Soderberg
S8	Lori Nixon
B1	Daela Taoaliii-Higgs (pronounced Day-la)
B2	Freddy Espinoza
9D	90 Days from Retirement
S9	All other operations

Statuses

Cold Lead	Marketing lead - signed up for newsletter, downloaded a free resource, or attended a large event
Lead	No official first appointment was done. Ex: Cancelled their first appointment; quick phone call or in-person intro happened; connection that will eventually become a client.
Lead No Contact	Reached out but was not able to make contact
Lead Not Won	Reached out, was able to contact, but did not want to schedule with us
Prospect	We are still actively meeting with them.
Prospect Not Won	Met with them, but they did not move forward with opening accounts
Long-Term Prospect	Met with them, they want to move forward but we cannot move their funds yet.
Client	Has accounts open with us
Onboarding	In the process of opening accounts/moving money
Professional Contact	Network Partners, CPA, Attorneys, Etc.

Segment Status Guide

Status	Segment
Cold Lead	H A+ A B C X
Lead	H A+ A B C X
Lead No Contact	H A+ A B C
Lead Not Won	H A+ A B C
Prospect	H A+ A B C
Prospect Not Won	H A+ A B C D
Long-Term Prospect	H A+ A B C
Client	H A+ A B C D E
Onboarding	
Professional Contact	

Advisor's Manager Guide

Scott	Todd
Alison	Andrew
Josh	Brock
Laura	Bart
Tanner	Joe
Tim	Jayson
Tyler S	Katie
Zach	Nate
	Rich
	Rinar
	Tyler W
	Tyson
	Carson

Segment Status Guide

Segment	Status	AUM
H	Leads, Prospects & Clients	\$6M+
A+	Leads, Prospects & Clients	\$3M-\$6M
A	Leads, Prospects & Clients	\$1M-\$3M
B	Leads, Prospects & Clients	\$500k-\$1M
C	Leads & Prospects Clients	\$250k-\$500k \$0-\$500k
D	Leads Clients	\$0-\$250k Annuity Only
E	Left Us/Exited or Passed Away	
X	Filters them out from sales dashboards. Waiting for Lead to reach out to us.	

Capita Financial Services

Address -	14658 S Bangerter Pkwy, Ste 300 Draper, UT 84020
Phone -	801-566-5058
Fax -	801-566-5058

Advisor Coverage

Blood Orange:	Rinar, Tyson L., Tyler W., Brock (Carson first coverage for RE/TL)
Deep Blue:	Tim, Zach G., Laura, Rich (Danielle first coverage for TG/ZG) (Tia first coverage for LH/RG)
Sky Blue:	Bart, Jayson, Joe (Melanie first coverage for BW/JM)
Sun:	Tyler S, Josh, Tanner, Al
Smoke:	Nate, Katie, Andrew

Internal Emails		Type
All Capita	capitateam@capitamail.com	Internal group only
Capita Advisors	advisors@capitamail.com	Internal group only
Executive Team	exec@capitamail.com	Internal group only
Partners	partners@capitamail.com	Internal group only
Operations	operations@capitamail.com	Separate Gmail Inbox
Support Staff	supportstaff@capitamail.com	Internal group only
Financial Services	financialservices@capitamail.com	Separate Gmail Inbox
Marketing	marketing@capitamail.com	Separate Gmail Inbox
IT	tech@capitamail.com	Separate Gmail Inbox
Human Resources	hr@capitamail.com	Separate Gmail Inbox
Support Staff Managers	supportstaffmanagers@capitamail.com	Internal group only
Service	service@capitamail.com	Separate Gmail Inbox
Advice Department	advisedepartment@capitamail.com	Internal group only
Compliance	compliance@capitamail.com	Separate Gmail Inbox

Rep Codes	Capita	Fidelity G Number	Schwab Master Account	APEX	Allianz
Michael Littledike	ML	G39162584	0818-0545		806103515
Tyler Williamson	TW	G39162600	0839-3463		806103547
Zaccary Call	ZC	G39162590	0822-5943		
Bart Wagstaff	BW	G39162586	0819-0760		806103658
Jayson McGinnis	JM	G39162594	0815-3709		806103696
Zach Geertsen	ZG	G39219651	0827-4879		806103773
Rinar Erickson	RE	G39162583	0843-4823		806103771
Tyson Long	TL	G39219650	0824-8277		806103776
Tim Gottfredson	TG	G39162596	0814-5308		806103768
Laura Hadley	LH	G39162593	0820-4819		806103774
Rich Gurr	RG	G39162591	0838-6845		
Joe Kent	JK	G39162599	0836-7126		806103783
Tyler Schenk	TS	G39162598	0830-2985		806103778
Joshua Scott	JS	G39162585	0838-5080		806103772
Tanner Smith	TA	G39162597	0823-7230		806103784
Brock Andersen	BA	G39162587	0814-8023		
Alison Frasca	AF	G39162589	0843-7858		
Andrew Angerbauer	AA	G39162592	0878-8281		
Katie Brinkerhoff	KB	G39162588	0836-9857		
Nate Christensen	NC	G39162595	0801-5695		
Carson Strong	CS	G45952507	0842-7996		
PCRA Accounts			0830-3716		