



# Codes

Rep Codes	Capita	Fidelity G Number	Schwab Master Account	NIPR	Allianz
Michael Littledike	ML	G39162584	0818-0545	8953040	741005486
Tyler Williamson	TW	G39162600	0839-3463		741005619
Zaccary Call	ZC	G39162590	0822-5943		
Bart Wagstaff	BW	G39162586	0819-0760		741005604
Jayson McGinnis	JM	G39162594	0815-3709		741005611
Zach Geertsen	ZG	G39219651	0827-4879		741005614
Rinar Erickson	RE	G39162583	0843-4823		741005605
Tyson Long	TL	G39219650	0824-8277		741005602
Tim Gottfredson	TG	G39162596	0814-5308		741005601
Laura Hadley	LH	G39162593	0820-4819		741005609
Rich Gurr	RG	G39162591	0838-6845		
Joe Kent	JK	G39162599	0836-7126		741005617
Tyler Schenk	TS	G39162598	0830-2985		741005626
Joshua Scott	JS	G39162585	0838-5080		741005613
Tanner Smith	TA	G39162597	0823-7230		741005622
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		

Payout Code Guide			
Field	Who's initials go in this field?	What can go in this field?	Special Rule
FAA	The advisor that ran the first appointment	2 initials	
Shared SRC	Secondary reason they met with us (only used with network partners with manager approval)	2 initials	Only with network partners
SRC	The reason they met with us about planning	2 initials	
CLS	The advisor who closed the deal	2 initials	
SRV	The advisor(s) who is/are currently their planner	4 initials	2 initials in Orion



Payout Code Guide								
Category	Type	Code	Name	SHD	SRC	CLS	SRV	Note
Advisor Codes	Advisor	AF	Alison	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	BW	Bart	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	CM	Cassie	Only with network partners	Yes	Yes	No	Primary Advisor Code, dictates compensation for this advisor
	Advisor	JK	Joe	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	JM	Jayson	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	JS	Josh	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	LH	Laura	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	ML	Mike	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	RE	Rinar	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	RG	Rich	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	TA	Tanner	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	TG	Tim	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	TS	Tyler S	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	TW	Tyler W	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	ZC	Zacc C	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	ZG	Zach G	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	TL	Tyson	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	AA	Andrew	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	KB	Katie	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
	Advisor	NC	Nate	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor
Advisor	CS	Carson	Only with network partners	Yes	Yes	Yes	Primary Advisor Code, dictates compensation for this advisor	
SRC Code Only	TD	Todd		No	Yes	No	No	SRC Code only
JNT SRV Code	MT	Mike & Tyson		No	No	No	Yes	Shared Servicing Code for unique HNW relationships ZC & ML need to be involved in
JNT SRV Code	ZT	Zacc & Tyson		No	No	No	Yes	Shared Servicing Code for unique HNW relationships ZC & ML need to be involved in
Senior Benefits Codes	Medicare agent on retainer	S1	Trenton	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S2	Matt	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S3	Brent	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S4	Chandler	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S5	Phillip	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S6		Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S7	Erik	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S8	Lori	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	S9	SB Operations	Only with an advisor	Yes	No	No	Senior Benefits direct referral from a staff member at SB
	Medicare agent on retainer	B1	Daela	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	B2	Freddy	Only with an advisor	Yes	No	No	Senior Benefits direct referral from agent
	Medicare agent on retainer	SB	SB General Presentations, No personal intro	Only with an advisor	Yes	No	No	SB opened the door to present, we got prospect as a result, not a direct intro from an agent
	Misc. codes	Non-active paid lead	SA	Smart Asset	Always CF	Yes	No	No
Former Advisor		LA	Luke Allen - Former Advisor	No	Yes	Yes	No	We leave Former Advisors in SRC & CLS so we know the previous client experience
General house code		CF	Capita General House	Most SHD for the firm should be CF	Yes	No	No	When Capita creates general prospecting opportunities. Cannot CLS or SRV because CF is not a person.
Former Advisor		MJ	Matt Johns - Former Advisor	No	Yes	Yes	No	We leave Former Advisors in SRC & CLS so we know the previous client experience
Classes/Program		RR	Return & Rise	No	Yes	No	No	Referral from Return & Rise Program



Payout Code Guide								
Category	Type	Code	Name	SHD	SRC	CLS	SRV	Note
Network Partners	RIA shared Revenue Partner	CW	Curated Wealth	Always LI on new CW Introductions	Yes	No	No	We pay Curated Wealth 20% of net-to-Capita fees as they are an RIA
	Estate Planner on retainer	GI	Greg Lyle - Intermountain Connections	Always CF	Yes	No	No	We track leads from Greg that were also a result of the Intermountain connection
	Estate Planner on retainer	GL	Greg Lyle - Non-Intermountain Connections	Always CF	Yes	No	No	We track leads from Greg that are solely an introduction from Greg and not IH affiliated
	Medicare agent on retainer	KA	Katrina Bourne	Always CF	Yes	No	No	We track direct referrals from Katrina
	Charitable Consultant on retainer	LI	Lindsay Hadley	Yes	Yes	No	No	LI can be Shared (Curated Wealth) or SRC. Hers are tricky, communicate with Cassie to clarify
	Business Consultant on retainer	MO	Menlo	Always LI on new MO	Yes	No	No	We were introduced to MO by LI, Follow Payout Code Bible for SRC on Next Gen referrals MO Clients
	Charitable Consultant on retainer	RC	Rick Clayton	Yes	Yes	No	No	RC can be SHD or SRC, communicate with Mike to clarify.
	Estate Planner on retainer	RD	Rustin Diehl	Likely CF	Yes	No	No	Rustin is an estate planner that gives us direct referrals.
	Estate Planner on retainer	R1	Klea Harris	Likely CF	Yes	No	No	Klea is part of the Rustin relationship so she rolls under RD with the R1 code
	Business Consultant on Retainer	ST	Sam Taggart	Always LI on new ST	Yes	No	No	Sam will mainly work with Brock, Follow Payout Code Bible for SRC on Next Gen referrals from ST Clients
	Paid leads	NW	Nerd Wallet	Always CF	Yes	No	No	Capita paid leads
Youtube Podcasting	Platform, Podcasting, Youtube	9D	90 Days From Retirement	Yes	Yes	No	No	Primary Advisor Code, dictates compensation for this advisor
	Platform, Podcasting, Youtube	FC	The Financial Call Podcast	Yes	Yes	No	No	Primary Advisor Code, dictates compensation for this advisor
	Platform, Podcasting, Youtube	RN	Retirement Nerds	Yes	Yes	No	No	Primary Advisor Code, dictates compensation for this advisor
	Platform, Podcasting, Youtube	ZY	Money Education	Yes	Yes	No	No	
<p>Unique Platform/Podcasting/Youtube SRC rules:</p> <p>FC, RN, XX, XX = Anything from Retirement Nerds (FC always shared)            CF, FC, XX, XX = Podcasting that doesn't include Retirement Nerds (no shared, standard CF)            9D/RN SF HHs with creation dates prior to 1/1/2024 were 9D            9D/RN SF HHs with creation dates on or after 1/1/2024 are RN            9D can still happen after 1/1/2024 if SB sends us a lead from their employer site, but this is less common</p>								