

Just as you give your clients a personalized onboarding experience to your firm, we do the same. Our process is geared to give you understanding and confidence in all aspects of the XYIS Platform as well as personalize the platform to your firm. Due to the personalized training and platform configuration, the onboarding process for XYIS will take between 2 and 4 weeks.

## DAY 1

Advisor selects "Join as RIA" in demo mode. Advisor receives and signs the **Go Live DocuSign** sent to their email account.

## DAY 2

Advisor receives and completes the **XYIS Onboarding Questionnaire** and provides proof of E&O coverage. (Sent to Advisor within two days of requesting to go live.)

## DAY 4

**Advisor is taken live** on XYIS platform. (Assumes steps 1 & 2 were completed in full.)

## PHASE 1

Advisor attends **Platform Configuration** training call to link Advisor's personal rep code to the platform and learn the platform basics, including how to configure and brand the platform.

Advisor signs **Shared Rep Code DocuSign** to generate shared rep code between Firm, XYIS, and RobustWealth. This permissions XYIS & RobustWealth as subadvisors on the account, allowing all current account data on that rep code to stream down to the platform.

## PHASE 2

**TD Ameritrade** creates a 3-way rep code, establishes the data feed and provides preassigned account numbers.

## PHASE 3

Advisor attends **Platform Utilization** training call to review adding clients, opening accounts, and processing bank transfers and ACATs. Advisor may now begin adding their own clients and opening accounts!

## PHASE 4

Advisor attends final **Platform Review** training call to assign goals/model portfolios, tag holdings, and set up billing for existing accounts. (Note: This is best done after first account is open and funded.)

### Resources:

Knowledge Base – [Support.xyinvestmentsolutions.com](https://support.xyinvestmentsolutions.com)  
Requests & Questions – [Support@xyinvestmentsolutions.com](mailto:Support@xyinvestmentsolutions.com) or (360) 301-7579  
Prefer the long version? Check out our [Detailed Onboarding Overview](#).

### Your Service Team:



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