PARTNER ONBOARDING OVERVIEW

GETTING TO LAUNCH

How Hargrove Firm’s Advisor Success team onboards new partner firms.

HARGROVE

Confidential · Prepared for partner review

OVERVIEW · WHAT YOU'RE GETTING INTO

A delivery model your advisors will actually use. A named team that runs it with you.

Partnering with Hargrove means plugging in an estate planning delivery model your advisors and clients will actually use — and a named team on our side that runs the playbook with you.

We've onboarded partner firms across boutique, mid-market, and enterprise tiers, and refined the process to be fast, structured, and supported at every step.

TYPICAL TIME TO FIRST REFERRAL

4 weeks

From signed agreement to first advisor referral, for partners on a standard SSO protocol.

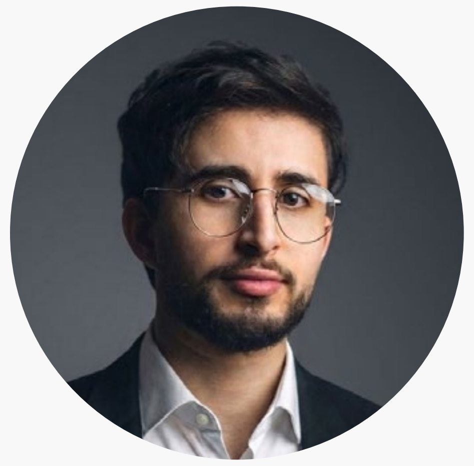
01 Portal Setup — 02 Training — 03 Go-Live — 04 Ongoing

A team that knows your firm.

Tim Fisk

SVP, PARTNERSHIPS

Tim serves as the liaison with firm leadership on ongoing strategic matters, working alongside Advisor Success to ensure partner firms have support at every stage of the relationship.



Mo Zoubi

DIRECTOR, RELATIONSHIP MANAGEMENT

Mo runs day-to-day relationship management for partner firms and is the primary contact for advisor training, activation, and operational questions.

Tim and Mo are your direct, named contacts — not a support queue. They'll know your firm, your team, and your goals from day one.

Clear expectations from day one.

The goal: every advisor on your team feels supported, every client gets a polished experience, and you have clear line of sight into what's working.

WHAT HARGROVE ADVISOR SUCCESS COMMITS TO

- A named relationship manager from day one — direct line, not a queue
- Branded portal stood up before launch, with SSO integrated where supported
- Live launch training tailored to your advisors and platform
- Hargrove Firm attorneys engaged on every client matter, with direct lines for advisor scope questions
- Monthly activity reporting and structured check-ins at 30, 60, and 90 days
- A clear escalation path for anything that needs partnership-level attention

WHAT WE ASK OF OUR PARTNERS

- Designate an internal point of contact for advisor and operational questions
- Provide brand assets and SSO details up front (see Phase 1)
- Host a formal launch moment — all-hands segment, standalone webinar, or recorded session
- Send referrals through the portal so each engagement is properly tracked and supported
- Share advisor feedback openly — good or bad — so we can adjust quickly
- Direct advisors to use the platform for every applicable client engagement

Four phases.

1

PHASE 1

Portal Setup

We configure your branded portal, SSO, and advisor access.

2

PHASE 2

Announcement & Training

You announce the partnership; we train your advisors.

3

PHASE 3

Go-Live

Advisors begin referring clients; we support every engagement.

4

PHASE 4

Ongoing Partnership

Structured check-ins at 30, 60, and 90 days, then a recurring cadence.

Phases 1–3 run sequentially. Phase 4 begins at go-live and continues for the life of the partnership.

Typical span: 4 weeks signed → first referral

1

PHASE ONE

Portal Setup

WHAT WE NEED	WHY WE NEED IT
Legal entity name (exact, with corporate suffix)	Used on advisor-facing materials, the portal footer, and the service agreement
Website URL	Drives portal branding consistency and outbound link references
Brand guide + SVG logo	Allows our team to match your visual identity in the advisor and client experience
SSO type — Okta, Google OAuth, Duo, Salesforce, Azure / Microsoft	Determines authentication setup and integration timeline — engage your IT team early
Known launch timelines or freeze windows	Helps us sequence portal go-live around your firm calendar (board meetings, planning season, etc.)

Typical timeline: 2 weeks for SSO protocols we've already integrated (Okta, Google OAuth, Duo, Salesforce, Azure / Microsoft). New protocols add engineering time on the front end.

2

PHASE TWO

Announcement & Advisor Training

Why the launch moment matters

A formal launch announcement — from firm leadership — is the single biggest driver of advisor activation. A quiet portal turn-on or a system notification consistently underperforms.

Advisors who see leadership endorse the partnership refer their first client meaningfully faster than those left to discover it on their own.

What Hargrove brings to your launch training

- A live walkthrough of the advisor portal, end-to-end, narrated by your dedicated relationship manager
- The four-stage client engagement process — what advisors send, what we deliver, and what their clients experience
- Live Q&A with a Hargrove Firm attorney so advisors hear directly from the legal team handling their clients
- A leave-behind advisor guide and recorded session for advisors who couldn't attend live

Format flexibility: All-hands segment · Standalone webinar · Pre-recorded for asynchronous delivery — whatever fits your team's rhythm.

3

PHASE THREE

Go-Live

Once your portal is live and your advisors are trained, referrals start flowing. Most advisors complete their first client referral within days of training — the portal is intuitive, the four-stage process is repeatable, and every advisor has a self-serve guide.

Your relationship manager monitors early activity closely, flags first-referral advisors for a personal touch, and steps in proactively if anything looks off.

FIRST REFERRAL WINDOW

Days

Not weeks. Most advisors complete their first client referral within days of training, without consulting their relationship manager.

4

PHASE FOUR

Ongoing Partnership

30 DAY CHECK-IN

- Review first-referral activity and advisor engagement
- Surface any portal, training, or attorney-fit issues
- Confirm internal champion and feedback loop are working as intended

60 DAY CHECK-IN

- Identify top early adopters and emerging power-user advisors
- Root-cause any advisors who haven't engaged yet
- Adjust messaging or training if specific cohorts need additional support

90 DAY CHECK-IN

- Review activation rate against benchmark
- Pull early client experience signals
- Align on expansion levers — additional cohorts, deeper integration, or marketing co-investment

RECURRING SYNC

Monthly or quarterly — whichever cadence fits your firm best. Some partners want a monthly working session; others prefer a quarterly executive review. Our interest in your success doesn’t stop after launch.

Advisors are set up to succeed.

Platform Walkthrough Video

A recorded end-to-end **demo of the advisor portal** — what to expect, where to click.

Advisor Guide

A step-by-step PDF on the four-stage client engagement process, from first conversation to final delivery.

Advisor Portal Resources Tab

Pricing reference, marketing materials, and referral instructions — all in-portal, no email chain required.

Advisor Success Team

A direct contact, not a support queue. For partnership-level questions, scope clarification, and escalations.

Advisors have what they need to refer their first client confidently — and to keep going from there.

Marketing tailored to your rollout

Hargrove's marketing team provides support and tools developed to help advisors win estate planning engagements on an ongoing basis. The relationship begins at launch, but success is driven over the duration of the partnership.

- Launch webinars and co-hosted sessions with your team
- Educational content to support advisors' client outreach
- In-office visits from our Advisor Success team to meet advisors directly
- Collateral and marketing resources
- Event and conference sponsorships — attorneys and expertise in front of your advisors

We'll work with you to decide what to lean into for launch, and what becomes part of the ongoing cadence.

QUESTIONS WE GET ASKED

FAQ

How long does setup actually take?

Most partners go from signed agreement to launched portal in 4 weeks when the SSO type is one we've integrated before — Okta, Google OAuth, Duo, Salesforce, Azure / Microsoft. New SSO protocols add engineering time on the front end. We flag this on our first technical call so you know what to expect.

What if our SSO isn't one of the standard ones?

We can still integrate — it just adds engineering time on our side. We've stood up integrations across most major identity providers, and our engineering team will scope the timeline accurately on the first technical call with yours.

What happens if an advisor has a mid-engagement question?

The Hargrove Firm attorney assigned to that client is the first stop — they're handling the legal work and have the full context. For portal, process, or partnership-level questions, the relationship manager is the direct contact.

NEXT STEPS · LET'S GET STARTED

We're ready to move as quickly as you are.

1. **Sign the service agreement**
   Paper that memorializes the partnership and scope.

2. **Submit portal setup information**
   Phase 1 inputs — legal entity name, website URL, brand guide + SVG logo, SSO type, launch timeline.

3. **Confirm launch training format and date**
   All-hands segment, standalone webinar, or recorded session.

4. **Designate an internal point of contact**
   Your champion for advisor-facing questions and the internal launch push.

Once we have these four items, your portal is typically live within 4 weeks, and your advisors are trained shortly after.

YOUR DIRECT CONTACTS

Reach out any time — we'll get a kickoff scheduled.

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