Fusion Elements

Training Certification Agreement

Fusion Elements is a technology platform built around the advisor, and their process. It can be customized to plug into over 700 different applications, depending what your team prefers to use.

This technology allows users to open multiple accounts in minutes. You can allocate existing accounts in even shorter of a time frame. It allows you and your staff to seamlessly work in nearly any operational facet of your business all within one window.

It's pretty powerful… But with great power comes great responsibility. Before you will be set loose within Elements to start transforming what you thought to be efficiency, you and your staff will go through a Fusion Elements Certification.

This course includes a series of videos, demos, exercises and quizzes designed to provide the basic foundation of the Elements operations platform, and will be required for you, the advisor, and your staff members involved in account services or overall operations of your firm.

It will provide an overview on the features, wizards, and organization of the portal including but not limited to:

- How to set up your Elements portal
- How to integrate your CRM data
- How to service an account
- How to allocate an account
- How to check the status of a ticket
- How to open a new account or multiple accounts
- How to deposit money into an account
- How to review advisor pay audits and reports
- How to research money managers
- …and more

As part of moving forward with the onboarding document, you agree to commit to completing the Fusion Elements Certification, as well as ensuring your staff completes the certification as well.