

# Service360 Team 40

BETTER SERVICE. BETTER RELATIONSHIPS.  
BETTER EXPERIENCES. EVERY DAY.

## Service Support

Your Service360 support team will take ownership of your service needs to establish a personalized working relationship with you and establish a team-based solution that provides a personalized single point of contact focusing on qualities that matter most to you: Accuracy, Consistency and Follow-up.

**(888) 575-4742: say “Team 40”  
for your Financial Service Professionals**



**Hours of Operation Monday – Friday \*8:00 am – 8:00 pm ET**

\*May be supported by non-service team members during period of high call volume or after hours.



**Doni Burris**



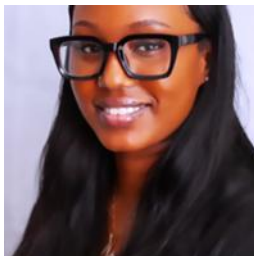
**Sakina  
Cheema**



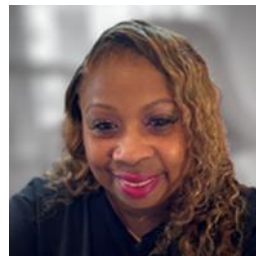
**Herve Drayton**



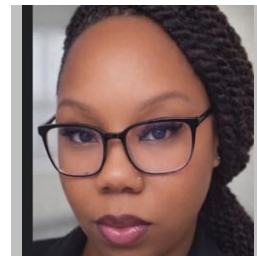
**Albert Enti**



**Miranda  
McCallum**



**Tamica  
Newton**



**Keviyonna  
Sanders**

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## SERVICE360 TEAM LEADERSHIP



**Brooke Argeny**

Team Lead

(980) 321-1807

[Brooke.Argeny@LPLFinancial.com](mailto:Brooke.Argeny@LPLFinancial.com)

Responsible for service support training, coaching and escalations.



**Robert Hansen**

Service Manager

(803) 650-7814

[Robert.Hansen@LPLFinancial.com](mailto:Robert.Hansen@LPLFinancial.com)

Responsible for leading your highly trained and skilled Financial Service Professionals.



**Scott Davis**

AVP, RIA Service

(704) 426-4981

[Scott.Davis@LPLFinancial.com](mailto:Scott.Davis@LPLFinancial.com)

Partnering with your Service360 Team Manager for added support & advocacy

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Service360 is a team-based service solution that provides a personalized single point of contact focusing on the qualities that matter most to you:

## Accuracy

## Consistency

## Follow-Up



FEATURES:

- Dedicated service from a small team who takes exclusive ownership of your service needs
- The opportunity to establish a personalized working relationship with your Service360 team members
- A single number to call with Interactive Voice Recognition
- Quicker, more direct processing of operational requests
- A single point of contact from start to finish, including issue resolution and follow-up

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**for your Financial Service Professionals**



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### Service360 Team Features

- Point-of-contact for questions covering multiple areas or issues (**New Accounts, Direct Business, Account Transfers, and Move Money**)
- A team manager and team lead who are easy to reach and take ultimate responsibility for their team’s delivery of outstanding service and/or are your escalation point of contact
- The opportunity to establish close working relationships with your Service360 team members
- Unsure of who to call? Contact your Service360 team

### Managed Outside the Service360 Team

Specialized Teams are subject matter experts in one area of focus. If you need assistance from any of the following specialized teams, you can reach them directly using the IVR

- Annuity Order Entry - via Trading option
- Client Compensation
- Compliance and Registrations
- Corporate Actions
- Estate Team (Death and Divorce)
- Financial Planning
- Retirement Services
- Sales and Insurance Group
- Technical Support
- Third Party Wire Team
- Trading

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ClientWorks help tools are designed to provide you with quick, easy access to the information and tools you need to succeed.


## Help Center

Located on the landing page of the Resource Center, the Help Center is the fastest way to get answers.

### When to Use

Your first stop for information, tutorials, or step-by-step assistance while completing processes.

### How to Access

From the ClientWorks Menu icon,  open the Resource Center. From the landing page, choose a topic.




## ClientWorks Help

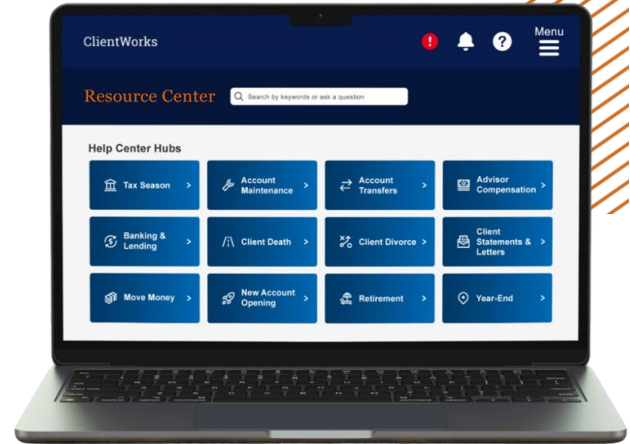
Use ClientWorks Help for step-by-step embedded WalkMe help pop-ups that guide you through processes.

### When to Use

Use ClientWorks Help for guided support or information while completing operational tasks in ClientWorks.

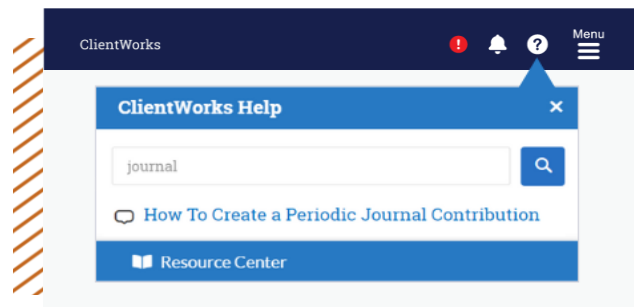
### How to Access

Select the Help icon  located on the top right of ClientWorks and search a topic such as *journal*. Choose the How To icon  to launch the WalkMe process with guided step-by-step assistance. Results without the  are direct links to resources.



Advisor Compensation	Client Statements & Letters
Account Maintenance	Move Money
Account Transfers	New Account Opening
Banking & Lending	Retirement
Client Death	Tax Season
Client Divorce	<b>And more to come!</b>

### ClientWorks Help, Search



### WalkMe, Guided Help Launch

