BUILD YOUR DREAM TEAM

PILLAR 1: Create Synergy & Success

Strategy 2 Clearly Define Roles

"In business, organization is an absolute necessity, not an alternative."

Larry Burkett

Clearly Define Roles

WHY is this Important?

Once you have mapped out Your Advisory Blueprint, you are ready to update or create Job Descriptions for everyone on the team. This is an important part of creating awareness about expectations and accountabilities – which, if unclear or non-existing, can result in frustration for everyone.

Most people want to know what is expected of them. Good team members want to exceed that.

Not only is this an important part of providing leadership for the individuals on your team today, but it allows you to post for new positions in the event of a staffing change – foreseen or unforeseen. Equally important, it will help you effectively manage the absences of individuals on the team due to illness, vacation, maternity leave, or other reasons – some of which are short term and others may be longer-term. It is important you have a plan for dividing up their tasks, so nothing falls through the cracks in the interim.

Having clearly outlined roles will also assist you as a leader to identify training programs, mentoring opportunities, and other resources to promote the continued professional growth and success of your team.

WHAT You Can Expect from this Best Practice

- Develop clear and accurate job descriptions for all individuals on your team
- Create awareness of expectations and accountability for each role
- Identify opportunities to provide additional training and mentoring to improve your team
- Be able to better manage absences of individual team members by understanding how to divide and conquer amongst the remaining individuals
- Be prepared for future staffing changes
- Know how to plan strategically for future changes on your team

HOW to Get Started

Develop Job Descriptions for Each Team Member

1. Update or create job descriptions to reflect the responsibilities outlined in Your Advisory Blueprint, completed in the previous section.
2. You may wish to refer to the samples provided to help you get started:
    - Administrative Assistant
    - Client Service Associate
    - Associate Advisor
    - Financial Advisor
    - Operations Manager
3. Once updated, carefully review it with each team member individually.
4. If you have realigned new tasks to them, make sure they are set up for success so they:
    - Understand the process and outcome desired.
    - Have the necessary resources (i.e., access to systems, office equipment); and
    - Receive additional training if needed.
5. Over time, if you make changes to Your Advisory Blueprint, be sure to translate those changes to the Job Descriptions you have created for the various individuals on your team.

Administrative Assistant

POSITION OVERVIEW

Provide ongoing daily administrative and operational support to the Financial Advisor. Maintain proactive, professional communication with clients to ensure an excellent client experience. Maintain a high standard of compliance in all aspects of related business activities. Support the Financial Advisor in achieving their business goals.

POSITION DESCRIPTION

1. **Ensure consistent delivery of high-quality service on the team to meet or exceed client expectations and service standards.**

   - Respond to and ensure all incoming client calls, e-mails, communications, faxes, and inquiries are responded to in a quick, efficient manner
   - Manage all incoming administrative communication as possible and delegate remaining communication to the Financial Advisor as and when required
   - Provide quick, effective responses and resolution to administrative-based client issues ensuring prompt and efficient problem resolution
   - Escalate problems or client issues and bring to the attention of the Financial Advisor as required
   - Review and distribute all incoming internal and external correspondence
   - Review and distribute all outbound correspondence (word processing and mail merges)
   - Manage all administrative requirements related to the day-to-day operations of the team including, but not limited to:
     - Account Opening and follow up
     - Account and Asset Transfer initiation and follow up
     - Systematic investment plans
     - Systematic withdrawal plans
     - Daily activity reports
     - Daily commission reports
     - Other routine administrative functions.
   - Monitor your individual activities to ensure adherence to policies and procedures, completeness, and accuracy
   - Maintain comprehensive communication with clients using a contact management system.
   - Schedule and prepare the Financial Advisor for all client meetings and reviews
   - Assist the Advisor in delivery of all relevant client service deliverables including, but not limited to the following: call rotations, birthday cards, holiday acknowledgements, newsletters, client events, etc.
   - Establish and maintain effective partnerships with the Financial Advisor, colleagues, and business liaisons outside of the branch team (i.e., Mutual Fund representatives, Accountants, Lawyers, etc.)
   - Ensure your individual work area is kept neat and tidy
   - Track and request office supplies as and when required

- Ensure proper operation and maintenance of team owned equipment
- Ensure the resolution of technical problems with team owned equipment, calling vendor or technical support staff as required

2. Maintain a high standard of compliance in all aspects of the business.

- Implement trades under the direct instruction of the Financial Advisor as and when authorized
- Review daily trade summary to ensure accurate trade implementation
- Ensure all supporting documentation for new accounts and other industry documentation is correct and complete
- Follow the Code of Conduct

3. Help the Financial Advisor achieve their business goals.

- Provide various business reporting as and when required by the Financial Advisor for review and/or discussion
- Meet with the Financial Advisor to understand business goals and the various strategies in place to achieve them
- Support ongoing change initiatives and new business practices

POSITION REQUIREMENTS

Specific Requirements:

- Appropriate licensing requirements
- x years of financial service experience
- Excellent computer skills with working knowledge of Microsoft Office
- Experience with or a working understanding of contact management software

General Requirements:

- Enthusiastic, motivated, committed, and a team player
- Reliable and professional
- Personable and able to form good rapport with others
- Good oral and written communication skills
- Highly organized, good at multi-tasking, and able to prioritize activities
- Process oriented with attention to detail
- Enjoys routine and administrative work responsibilities
- Able to work well in a dynamic, fast-paced environment.
- Interpersonal skills to develop and maintain good relationships with the Financial Advisor, clients, and colleagues
- Good problem-solving skills sufficient to identify a problem, generate solutions, and decide on a course of action at an administrative level

Client Service Associate

POSITION OVERVIEW

Coordinate all aspects of Office Management on the team to create a positive, organized, and professional environment. Meticulously manage all aspects of the Client Service Experience to ensure standards of excellence are achieved as it relates to team branding, firm service standards, and compliance. Fully coordinate all aspects of the New Client Onboarding Process to ensure this process is implemented flawlessly and consistently. Support the Financial Advisor in achieving their business goals.

POSITION DESCRIPTION

1. **Coordinate all aspects of OFFICE MANAGEMENT to ensure effective team operations and the optimal client environment and experience.**

   - Responsible for a variety of tasks to ensure the Office Management is on point for everyone
   - Answer all incoming calls in a timely, professional manner, managing calls as appropriate, forwarding to others when necessary, and taking messages if required
   - Consistently manage the team email box in a timely manner
   - Manage the Compliance Reporting aspects of the team
   - Maintain comprehensive communication records using a contact management system including email capture, notes, call history, tasks, FORM Profiles, etc.
   - Fully integrate the CRM with automation of each of your ongoing Office Management, Client Service, and Client Onboarding responsibilities
   - Work collaboratively with back office and other third parties where appropriate to create smooth operations for the team
   - Manage and maintain the Procedures Manual for the team
   - Review and distribute all inbound physical correspondence (mail, FedEx & courier).
   - Process, distribute, and track all outbound physical correspondence (mail, FedEx & courier)
   - Coordinate the procurement of any Office Equipment if required
   - Ensure office reception area and any client meeting areas are neat, organized, and professional (ensure proper set up and take down/clean-up is maintained)
   - Water the plants regularly so they enhance the office environment
   - Initiate holiday themes (Christmas, Canada Day, etc.) when appropriate in the office using decorations, music, etc. to make it a fun and festive environment for all
   - Monthly review of team website to ensure functionality of all links and initiate new articles for inclusion, as well as provide feedback for other general enhancements
   - Attend and participate in the Weekly Team Meeting
   - Work collaboratively with everyone on the team to ensure a positive work environment and exceptional client experience
   - Provide back up when other operations team members are away for their lunch break, vacation, or out of the office sick
   - Assist other team members when needed to balance out capacity even when it means you are doing something outside of your typical job description

2. **Meticulously manage all aspects of the CLIENT SERVICE EXPERIENCE to ensure we exceed client expectations, firm service standards, and adhere to all Compliance and Regulations.**

   - Manage all incoming client service-related communication as efficiently as possible and delegate remaining communication to others on the team as and when required (client calls, e-mails, communications, faxes, and inquiries)
   - Provide quick, effective responses and resolution to client service & experience issues ensuring prompt and efficient problem resolution
   - Escalate problems/client service issues and bring to the attention of other team members as required
   - Greet and welcome clients when they arrive to the office – provide place to hang coats, offer them beverages, and make them feel welcome
   - Coordinate and manage implementation of the following client service deliverables:
     - Schedule and confirm all Client Review Meetings
     - Assist with basic Client Review Meeting preparation
     - Set up proactive Call Rotations on CRM for the Advisors
     - Coordinate implementation and delivery of Moments of Truth for top-tier clients
     - Coordinate Thanksgiving Acknowledgements (Card & Gift)
     - Proactive manage Articles of Interest delivery
     - Design, track, and coordinate Birthday Acknowledgements
     - Coordinate all aspects of Client Appreciation Events
     - Coordinate all aspects of Educational/Workshop Events
     - Assist with the delivery of any other client service initiatives as requested (either new services and/or assisting other team members with their responsibilities).
   - Ensure items required to deliver the ongoing client experience are available when needed: Cards, Gifts, etc.
   - Update the team at the Weekly Team Meeting with respect to upcoming client service initiatives.

3. **Coordinate ALL aspects the NEW CLIENT ONBOARDING PROCESS.**

   - Exclusively own the responsibility of making sure every prospect, introduction, or referral is set up properly to experience all steps to becoming a client – from start to finish (set up contact record in the CRM, trigger related follow up, trigger relevant workflows, and action items, capture notes, etc.)
   - Coordinate and manage the complete implementation of the New Client Process, assisting other team members by keeping them on track and organized with the entire process
   - Create a new Contact Record coded as 'Prospect' and complete the basic information on the CRM to start the process (name, address, contact information, etc.)
   - Launch the New Client Onboarding action sequences to ensure methodical delivery of the new client experience ensuring all activities, correspondence, emails, etc. are saved to the contact record creating a history of communication on the CRM
   - Greet and welcome prospects when they arrive to the office – provide place to hang coats, offer them beverages, and make them feel welcome
   - Update the team at the Weekly Team Meeting with respect to how many new clients are in the pipeline and where they are at in the New Client Process.
   - Assist with the specific delivery of these New Client Onboarding steps:

        - Sending out Introduction Kits
        - Confirming Appointments
        - New Client Welcome Gift & Card
        - New Client Welcome Letter
    - Update fields and other information as prospects are converted to clients (i.e., switch code to ‘client’ and identify proper client classification)
    - Activate the Client Service Model for each new client ensuring they receive all aspects of the Client Experience designed specifically for their client classification
    - Ensure items required to deliver the new client experience are available when needed: Client Binders, Lavish Cards, New Client Gifts, etc.
    - Provide feedback to the team related to any client feedback and comments related to this experience
    - Look for ways to ensure the new client onboarding is the best possible experience for each prospective new client.

4. **As needed, always back up the Administrative Assistant on to ensure consistent delivery of high-quality ACCOUNT ADMINISTRATION designed to exceed client expectations, service standards and adhere to all Compliance and Regulations.**

    - Provide back up as and when required

5. **Help the entire team achieve specific BUSINESS GOALS and OVERALL SUCCESS.**

    - Participate in the Quarterly Strategic Team Meetings
    - Participate in the Annual Business Planning Session
    - Provide various business reporting as and when required by the Investment Advisor for review and/or discussion
    - Meet with the Investment Advisor to understand business goals and the various strategies in place to achieve them
    - Have a Weekly Plan for yourself as it relates to your role and related deliverables
    - Support ongoing change initiatives and new business practices in the business
    - Be willing to learn new things to build confidence and maintain enthusiasm for your role

POSITION REQUIREMENTS

Specific Requirements:

- Appropriate licensing requirements
- x years of financial services experience
- Excellent computer skills with working knowledge of Microsoft Office
- Experience with or a working understanding of contact management software

General Requirements:

- Enthusiastic, motivated, committed, and a team player
- Reliable and professional
- Personable and able to form good rapport with others
- Good oral and written communication skills

- Highly organized, good at multi-tasking, and able to prioritize activities
- Process oriented with attention to detail
- Enjoys routine and administrative work responsibilities
- Able to work well in a dynamic, fast-paced environment
- Interpersonal skills to develop and maintain good relationships with the Financial Advisor, clients, and colleagues
- Good problem-solving skills sufficient to identify a problem, generate solutions, and decide on a course of action at an administrative level

Associate Advisor

POSITION OVERVIEW

Provide ongoing client and business development support to the Financial Advisor. Maintain proactive, professional communication with clients to ensure an excellent client experience. Maintain a high standard of compliance in all aspects of the business. Support the Advisor in achieving their business goals.

POSITION DESCRIPTION

1. **Ensure consistent delivery of high-quality service to meet or exceed client expectations and service standards.**

    - Respond to and ensure incoming account or investment-based client calls, e-mails, communications, faxes, and inquiries are responded to in a quick, efficient manner
    - Manage as much of the incoming account or investment-based communication as possible and only delegate to the Financial Advisor as and when required
    - Provide quick and effective responses and resolution to client account or investment issues to ensure prompt and efficient resolution
    - Escalate account or investment problems and bring to the attention of the Financial Advisor as required
    - Review relevant incoming internal and external correspondence
    - Assist in the creation and review of all outbound correspondence
    - Monitor team activities to ensure adherence to policies and procedures, completeness, and accuracy
    - Effectively manage the Associate-delegated clients you are responsible for:
        - Bring on new Associate level accounts, as well as provide ongoing long-term maintenance of these accounts
        - Creation of Investment Policy Statement and/or other financial planning reports as required
        - Review accounts and make recommendations accordingly
        - Implement trades as appropriate
        - Prepare for, implement, and follow up for review meetings
        - Initiate and complete call rotations
        - Maintain comprehensive pro-active communication using a contact management system
        - Build and establish trust and rapport with these clients through continued, professional contact
    - Assist the Financial Advisor with all other clients:
        - Creation of Investment Policy Statement and/or other financial planning reports as required
        - Prepare the Financial Advisor for all client meetings and reviews
        - Implement trades as authorized by the Financial Advisor
        - Maintain comprehensive communication with clients using a contact management system

        - Build and establish trust and rapport with these clients through supportive, professional contact

- Support the Advisor in delivery of all relevant client service deliverables including, but not limited to, call rotations, birthday cards, holiday acknowledgements, newsletters, client events, etc.
- Establish and maintain effective partnerships with the Financial Advisor, colleagues, and business liaisons outside of the branch team (ie. Mutual Fund representatives, Accountants, Lawyers, etc.)

2. Maintain a high standard of compliance in all aspects of the business.

- Implement trades for the Financial Advisor as and when required
- Review portfolio asset allocations and re-balance accordingly (independently or through review with the Financial Advisor)
- Ensure all supporting documentation for new accounts and other industry documentation is correct and complete
- Follow the Code of Conduct

3. Help the Financial Advisor achieve their business goals.

- Manage the Associate delegated clients accordingly
- Support the Financial Advisor with clients as required
- Provide, review, and discuss various business reporting as and when required by the Financial Advisor for review and/or discussion
- Meet with the Financial Advisor to understand business goals and the various strategies in place to achieve them
- Support ongoing change initiatives and new business practices in the business

POSITION REQUIREMENTS

Specific Requirements:

- Appropriate licensing requirements
- x years of financial services experience
- Knowledgeable in Asset Allocation and Portfolio Risk Management
- Experienced with general investment products (stocks, bonds, mutual funds, etc.)
- Experienced using and preparing financial plans using planning software
- Excellent computer skills with working knowledge of Microsoft Office
- Experience with or a working understanding of contact management software

General Requirements:

- Enthusiastic, motivated, committed, and a team player
- Reliable and professional
- Personable and able to form good rapport with others
- Excellent oral, written, and personal communication skills
- Organized with good project management skills

- Able to work well in a dynamic, fast-paced environment
- Enjoys increased work responsibilities
- Interpersonal skills to develop and maintain good relationships with the Financial Advisor, Sales Assistant, clients, and colleagues
- Well-developed problem-solving skills sufficient to identify problems, generate solutions, and decide on a course of action at a basic administrative level

Financial Advisor

POSITION OVERVIEW

Part of a multi-generational team with a passion for helping clients achieve financial security; the kind that comes from knowing that clients have a comprehensive plan tailored specifically to them and their families. Candidates must take the time to understand clients' families, occupations, and recreational details, in addition to their investment needs and the financial aspirations they hold for themselves and their family.

POSITION DESCRIPTION

1. **Ensure consistent delivery of high-quality service to set the client on track to live the lifestyle they desire today and for future generations.**

    - Respond to team members about meetings and investment solutions when needed
    - Create customized plans for clients with tangible recommendations for meeting even their most challenging goals
    - Help clients develop strategies for retirement, no matter their life stage
    - Work to actively meet with clients face-to-face for meetings or social events
    - Finalize Plans and update when necessary
    - Present Articles of Interest to clients as discovered.
    - Effectively manage day to day client needs
        - Meetings face-to-face, phone, or virtually
        - Ensure that the Associate Advisor is aware of the tasks and information for upcoming meetings with clients
        - Review portfolios and make recommendations accordingly
        - Implement trades as appropriate
        - Prepare for, implement, and follow up review meetings
        - Initiate and complete call rotations
        - Maintain comprehensive pro-active communication using a contact management system with clients and prospects
        - Build and establish trust and rapport with these clients through continued, professional contact
        - Learn as much as you can to develop relationships with the clients and their family members by leveraging the other advisors on the team

2. **Maintain a high standard of compliance in all aspects of the business.**

    - Follow the team's code of conduct
    - Make notes on clients in the interactions tab for other team members and compliance
    - Review KYC rules
    - Stay up to date on new industry and firm requirements

3. Achieve business goals.

- Help lead the team with Business Planning and annual goals
- Conduct quarterly strategic meetings with all team members
- Have Annual reviews and assessment of personnel
- Handle personnel issues - HR Sensitive
- Work with the Agenda Moderator to manage weekly team meetings to cover all aspects of the past and coming week
- Examine best practices to understand how to change as the industry changes

POSITION REQUIREMENTS

Specific Requirements:

- Appropriate licensing requirements
- 10 + years of financial services experience
- Knowledgeable in Asset Allocation and Portfolio Risk Management
- Experienced with general investment products (stocks, bonds, mutual funds, etc.)
- Excellent in relationships with clients and team members

General Requirements:

- Enthusiastic, motivated, committed, and a team player
- Reliable and professional
- Personable and able to form good rapport with others
- Excellent oral, written, and personal communication skills
- Organized with good project management skills
- Able to work well in a dynamic, fast-paced environment
- Thrives with increased work responsibilities
- Interpersonal skills to develop and maintain good relationships with FA's, Sales Assistants, Clients, COI's, and Strategic Partners

Operations Manager

POSITION OVERVIEW

This position provides day-to-day management, operations coordination, and team leadership of employees in a manner that aligns with the values, culture, and vision of the company.

The Operations Manager is a high-level position which requires demonstrated competence in the areas of operations and client service within the Financial Services Field. This position is responsible for managing all hands-on operational aspects of the Company. Provides leadership, management, and vision necessary to ensure that the Company has the proper operational controls, administrative procedures, people, and the systems in place to effectively grow the organization and to ensure operating efficiency.

This position will consistently follow high standards of business and professional ethics and legal and regulatory requirements when dealing with others and/or performing work activities.

POSITION DESCRIPTION

1. **Fully coordinate all aspects of the BUSINESS OPERATIONS to ensure processes, systems, and people are achieving efficiency, consistency, and professionalism in all aspects of core business activities.**

   - Responsible for the measurement and effectiveness of all internal and external processes
   - Oversees/improves/develops tools, systems, and processes to provide efficient, consistent, and professional business operations across all roles and responsibilities
   - Analyzes and organizes operations and procedures, including bookkeeping, preparation, and submission of payroll information, personnel, information management, filing systems, requisition of supplies, and other clerical services
   - Responsible for the day-to-day management of office tasks, equipment, and facility
   - Researches and develops resources that create timely and efficient workflow
   - Coordinates, customizes, and promotes full integration of the CRM including user set-up, initial and ongoing training, customization and workflow development, and trouble shooting
   - Identifies opportunities for team operations enhancement through training, technology, and/or other resources
   - Leads and supports the team with technology updates and new technology adoption
   - Maximizes office productivity through proficient use of appropriate software applications
   - Support ongoing change initiatives and new business practices in the business

2. **Oversees all aspects of HUMAN RESOURCES functions for the team.**

   - Promotes and engages in a culture that reflects the organization's values, encourages high performance and continuous improvement, and values learning, commitment to quality, and accountability
   - Oversees, directs, and organizes the work of all employees.
   - Assigns and delegates work, provides support and feedback to team members, and executes

client-related projects

- Directs and manages all client contact to ensure client satisfaction
- Provides support to Advisor(s) through innovative and successful resolution of client service issues and process implementations
- Establishes performance indicators and monitors employee performance, along with developing goals, assigning accountability, setting objectives, and establishing priorities, etc.
- Sets and adjusts rates of pay, hours worked for employees, and compensation tracking. Recommends salary adjustments, transfers, promotions, and dismissals
- Completes and provides employees with Annual Reviews and coaching sessions
- Looks for opportunities to mentor, train, and support team to be successful in their role
- Responsible for motivating and retaining employees to create a high-performance team
- Develops and coordinates delivery of all general training for employees—personal, professional, and team development
- Responsible for attracting, screening, interviewing, and assessing potential new employees.
- Plans and conducts all new employee set up (HR & Office Space), training and orientation in alignment with values, culture, and vision
- Spearheads the development, communication, and implementation of effective growth strategies and processes
- Review clerical and personnel records to ensure completeness, accuracy, and timeliness
- Maintains a favorable working relationship with all other company employees to foster and promote a cooperative and harmonious working climate, which will be conducive to maximum employee morale, productivity, and efficiency/effectiveness
- Provides back-up assistance for team members as needed
- Accepts and performs other duties as assigned
- Regular and predictable attendance, punctuality, and strict adherence to the company's attendance policy are essential functions of this position

3 **Coordinates and oversees all aspects of INTERNAL TEAM COMMUNICATION**

- Schedules, coordinates, and facilitates Weekly Team Meetings
- Schedules, coordinates, and facilitates Quarterly Strategic Team Meetings along with appropriate follow up activities for individual team members
- Schedules, coordinates, and facilitates Monthly Partner/Advisor Meetings along with preparation of all key business metrics for review and assessment
- Schedules, coordinates, and facilitates Operations Meetings as and when required
- Schedules, coordinates, and facilitates the Annual Business Planning Session
- Provides team with a copy of the Annual Goals & Objectives to ensure they continue to be aligned with the vision and understand their role in supporting it
- Collaborates with other members of the management team to develop and implement plans for the operational infrastructure of systems, processes, and personnel designed to accommodate the rapid growth objectives of the company
- Participates in compliance meetings and provides compliance direction to staff and Advisor(s). Acts as compliance liaison by monitoring and handling legal compliance for company i.e., CE credits and tracking, business/transaction paperwork
- Keeps the owner(s) of the company promptly and fully informed of all problems or unusual matters of significance and takes prompt corrective action where necessary or suggests alternative courses of action which may be taken

4. Promotes and Manages Ongoing BUSINESS DEVELOPMENT

- Ensures an exceptional client experience is delivered to maximize internal referrals, this includes a variety of client service activities and events
- Works collaboratively with Strategic Partners to maximize external referrals
- Oversees website to ensure it is professional and updated
- Directs social media marketing and communication
- Ensures all company branding and client-facing items look consistent and professional - follows all standards related to logos use, fonts style & size, colors, etc.
- Ensures all company branding and client-facing items are compliant
- Ensures all company messaging is aligned with the company vision
- Initiates ideas for innovative and high-quality business development

5. Provides Meaningful and Accurate BUSINESS REPORTING

- Develops tools, systems, and processes to provide critical operational information to leadership and makes actionable recommendations based on the information
- Provides timely, accurate, and complete reports on the operating condition of the Company
- Tracks and manages expenses, transfers, GDC reports, compensation statements, and retainer billing
- Supports all Compliance Reporting and oversight within the practice - develops an understanding and adheres to all compliance regulations
- Provides and summarizes all other reporting necessary for the continued success of the company

POSITION REQUIREMENTS

Specific Requirements:

- Appropriate licensing requirements
- x years of financial services experience
- Excellent computer skills with working knowledge of Microsoft Office
- Experience with or a working understanding of contact management software

General Requirements:

- Enthusiastic, motivated, committed, and a team player
- Reliable and professional
- Personable and able to form good rapport with others
- Excellent oral, written, and personal communication skills
- Organized with good project management skills
- Able to work well in a dynamic, fast-paced environment.
- Enjoys increased work responsibilities
- Interpersonal skills to develop and maintain good relationships with the Financial Advisor, Sales Assistant, clients, and colleagues
- Well-developed problem-solving skills sufficient to identify problems, generate solutions, and decide on a course of action at a basic administrative level

My Action Items & Notes