

Train your whole unit to ask the right questions.

Write your questions and messages once. Every advisor sees them on their prep sheets and client pages, next to everything AdvisorKin already does for them. One bill for the team.

Team plan

Only **\$20.83** /month

Per advisor, paid yearly (\$250), or \$25 month to month. Pro is normally \$290 a year.

- ✓ Your unit playbook on every advisor's phone
- ✓ One bill for 5 to 20 advisors, monthly or yearly
- ✓ Give extra analyses to your advisors
- ✓ 14-day free trial for leaders new to teams
- ✓ Each advisor's clients stay private to them

Your unit playbook, in every advisor's pocket

☰ Your first meeting questions

On every first meeting prep sheet

FROM YOUR TEAM

"What would make today worth your time?"

💬 Your review questions

Under Ask next time, for every client

FROM YOUR TEAM

"Has anything changed at work or at home since we last met?"

📧 Your messages

On every client page, name filled in

FROM YOUR TEAM

Hi Sarah, thanks for your time today. I'll send the comparison by Friday.

And everything Pro does for each advisor

Unlimited clients

Their whole book in one place, imported from a spreadsheet.

30 analyses a month each

Key facts, communication style, follow-ups and a message to send.

Prep sheet for first meetings

What to ask a new prospect, ready the moment it's booked.

Reminders in time

Birthdays, follow-ups and big dates, on Today and on Telegram.

Clients stay with the advisor

- ✓ **Each advisor signs in with their own email**
Their own account, their own client book
- ✓ **You pay the bill, but you can't see their clients**
No one in the team can see anyone else's
- ✓ **You see who's putting work in**
Clients added, meetings logged and analyses this month, never names or notes
- ✓ **Advisors who leave keep their clients**
Their account stays theirs, on Free or their own plan

How the free trial works

- 1 **Create your free account**
At advisorkin.com/teams. You don't have to use AdvisorKin yourself.
- 2 **List your advisors**
Pay for 5 to 20, add their emails now or later. Type in a card to start.
- 3 **They get Pro straight away**
When they sign up with that email, or at once if they have an account and aren't on another team.
- 4 **14 days free, then monthly or yearly**
Charged when the trial ends, unless you cancel before. Once per card, for leaders never on a team before.

Questions from team leaders

What goes in the unit playbook?

The questions you'd want every advisor to ask at a first meeting and at reviews, and the messages you'd want them to send. You add and remove them on your Team page, and everyone sees the update straight away.

Do advisors keep their clients if they leave?

Yes. Clients live in each advisor's own account, not the team's, and nothing is deleted. With their own Pro plan everything stays as it was. On Free, their 10 most recently met clients stay active and the rest are kept, view only, until they're on Pro again.

Can I buy analyses for my advisors?

Yes. Tap Give analyses next to an advisor who has joined and pick a pack, from 10 for \$9. They go into their account, never expire, and we tell them they're from you. A refunded gift is taken back.

Can I see my advisors' clients or notes?

No. You see clients added, meetings logged and analyses used this month, and when each advisor was last active. Never who their clients are, their total, or their notes and messages. Advisors are told when they join.

Can I add or swap advisors?

Yes, any time on your Team page, up to 20. Each extra advisor is \$25 a month, or \$20.83/month paid yearly; added partway through, you pay only for the time left. More than 20? Email us.

What if the trial doesn't work out?

Cancel before it ends and nothing is charged or deleted. The first payment after a trial isn't refunded. One trial per card, for leaders never on a team before; if the card had one, we cancel straight after checkout.

Start a free 14-day team trial

Create a free account and list your advisors. Questions: support@advisorkin.com

advisorkin.com/teams