

Original Owner

What is it?

It's a field in XLR8 that indicates who opened the door for this new business. It's required on Prospect, Household, and Client Business entities.

This is different from Primary Advisor and Commission Splits.

Why is it important?

This field will be used to determine an advisor's book of business moving forward.

How is it determined?

- Original Owner does not follow past one degree of separation.
- WM Advisors will need to dictate to the CSS team who the Original Owner is when setting up new entities in XLR8.
 - Service teams - if you don't know the Original Owner, ask the advisor.
 - Advisors - If there is a nuanced scenario, reach out to Nick Madl.

Examples:

1. Advisor X brings his uncle in as a client. Advisor X is not the Primary Advisor. Advisor X is Original Owner
2. Advisor Y is Original Owner of a Retirement Plan. Advisor X converts a participant in the Retirement Plan to a WM client. Advisor Y is the Original Owner of the WM Client Household.
3. Same scenario as 2 above, but WM Client now refers their parents as WM clients. Advisor X would be the Original Owner of the parents' account.

What do I do if Original Owner is incorrect in XLR8?

1. Within the Entity in XLR8, create a task.
2. Assign it to Mandie Scott. Subject should be Original Owner.
3. Add a Due Date (this can be the current date).
4. In the Comments Field, indicate who the Original Owner should be changed to.
5. Click Save.

Filters: Within 2 months • All activities • All types

[Refresh](#) • [Expand All](#) • [View All](#)

▼ **Upcoming & Overdue**

New Task _ ↗ ✕

*** Assigned To**

Mandie Scott ✕

*** Subject**

Original Owner 🔍

Task Start Date

12/2/2025 📅

*** Due Date**

12/2/2025 📅

Completion Date 📅 ⓘ

Save

✓ **Upcoming & Overdue**

New Task _ ↗ ✕

Assigned To

--None-- ▼

Category

--None-- ▼

Task Sub-Category

--None-- ▼

Comments

Change Original Owner from Advisor X to Advisor Y.

Meaningful Activity

Available Chosen

Last Meeting ▶

Last Proactive Touch ▶

Save