

NLS Weekly Team Training

Meeting Recap PDF | June 1, 2026 | Source: Fathom meeting summary

Meeting Link: <https://fathom.video/calls/691636610>

Meeting Purpose

Review new business submission requirements and payroll integration guides.

Key Takeaways

- **New Submission Process:** All four required documents - Client Profile, Commission Agreement, Employer Packet, and Sold Case Notification - must be submitted together in a single HubSpot packet before implementation can begin.
- **Payroll API Guides:** New guides for major payroll platforms such as ADP and iSolved support direct API integration, helping automate data collection and reduce reliance on manual census files.
- **Commission Structure Update:** A new structure rolls out by July 1. Kingston Advantage will see a significant commission reduction; additional details are expected on the next call.
- **Meeting Cadence:** Weekly team calls are moving to a bi-weekly cadence. The next meeting is scheduled for June 15, 2026.

New Business Submission Process

Effective	May 22, 2026
Requirement	Submit all four documents in one HubSpot packet before implementation starts.
Client Profile	Captures client information and supports solution-based selling. It can be completed after the meeting.
Commission Agreement	Handled by Andrew.
Employer Packet	Handled by Andrew.
Sold Case Notification	Handled by Andrew.
Quote Tool	For quoting only; it is not a substitute for a pro forma.

Payroll Integration Guides

The guides are intended to automate data collection for pro formas and requalifications by connecting directly with the client's payroll software through API integration.

- Send the client the relevant payroll guide.
- The client follows the steps to create the API connection.
- The API sends data directly to the NLS team.
- Available guides include major platforms such as ADP, iSolved, Paycore, UKG, and Namely.

- Guides for platforms such as Gusto and Paycom are still in progress and may require a call with the client's payroll representative.
- A new API fee applies to producers when building APIs for unknown payroll software.

Commission Structure & App Updates

- The commission structure is effective immediately, with all NGAs expected to transition by July 1, 2026.
- Full commission details will be covered on the next team call.
- Kingston Advantage commissions are significantly lower; Capstone Advantage is slightly higher; Century Premier is slightly lower.
- The new Wellution app is live for members, while producer access is pending rollout.
- Producer access is expected to be free for producers with active business; a paid subscription model is planned for others.
- New app functionality includes single sign-on for benefits, expanded legal/identity theft services for families, and development of a GLP-1 program.

Partnership Inquiry

A question was raised about whether NLS plans can be listed in payroll marketplaces such as iSolved or PrismHR. The answer given was that this is unlikely because GP prefers direct partnerships and does not want to cede control to payroll companies. Andrew will pass the inquiry up to GP leadership.

Next Steps

Andrew	Resend the May 22 email with the new submission requirements to the team.
Andrew	Email the Client Profile form to Scott.
Andrew	Pass Darius's payroll marketplace partnership inquiry to GP leadership.
All	Adopt the new bi-weekly meeting cadence.
All	Attend the June 15, 2026 meeting for the commission structure deep-dive.

Prepared from the Fathom AI meeting summary. Please reference the original recording for exact wording and timestamped discussion context.