

Weekly Team Training - March 17

[Overview of the Undeniable Advisor community @ 0:00](#)

Tina provided an overview of the Undeniable Advisor community, including the free resources available to all members and the additional benefits of the paid membership. She highlighted the CRM tool, Secure Future Investor website, and other programs included with the paid subscription.

[Capstone program updates @ 2:49](#)

Andrew reviewed the latest updates to the Capstone program, including the new WebLution app with features like biometric scanning, personalized health assessments, and fitness/nutrition resources. He also covered the expanded prescription drug coverage and the addition of Life Guides for mental health support.

[Employer savings and compliance @ 7:53](#)

The group discussed the potential employer savings from the Capstone program, with estimates of \$700+ per employee per year in savings. They also reviewed how the program is designed to be ACA-compliant and provide a valid insurance option for small businesses.

[Indexing and the Kingston plan @ 41:45](#)

Al was going to provide an overview of indexing, but decided to postpone it to next week. Andrew did discuss the Kingston plan, which is a version of the Capstone program tailored for groups that don't contribute to FICA, such as municipalities.

[Recap and next steps @ 57:49](#)

The group wrapped up the meeting, with Al emphasizing the value of the Undeniable Advisor community and paid membership. They also addressed a participant's issue accessing the Capstone portal and discussed plans to make the webinar recordings available.

Action Items

- Check status of demo app for capstone program, similar to Amaze Cryer - [WATCH \(5 secs\)](#)
- Follow up on getting Kingston plan added to portal - [WATCH \(5 secs\)](#)
- Help Susie White w/ portal access. Email her for account email to resend verification - [WATCH \(5 secs\)](#)
- Distribute Wed training link to team once received from Brian - [WATCH \(5 secs\)](#)

