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| **Procedure Name:** | **WMP Household Update** | **A picture containing text, clipart  Description automatically generated** | |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** | Katie Weinschenk |

**Description**

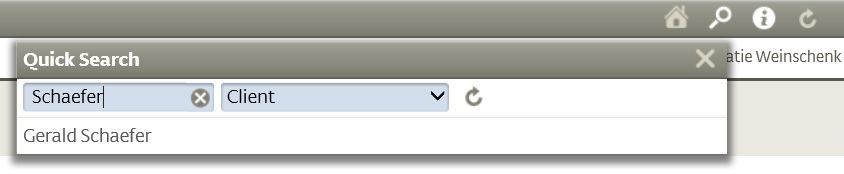
When setting up WMP accounts, we need to make some household updates to ensure everything is titled correctly and will produce accurate reporting.

**Assumptions**

N/A

**Procedure**

1. Household Title & Benchmarks
   1. In WMP, click on the magnifying glass in the upper right-hand corner
   2. Search for the client by last name in the left box and choose Client in the right box



* 1. Select the correct client
  2. Go to the General tab and click Edit

Graphical user interface, text, email

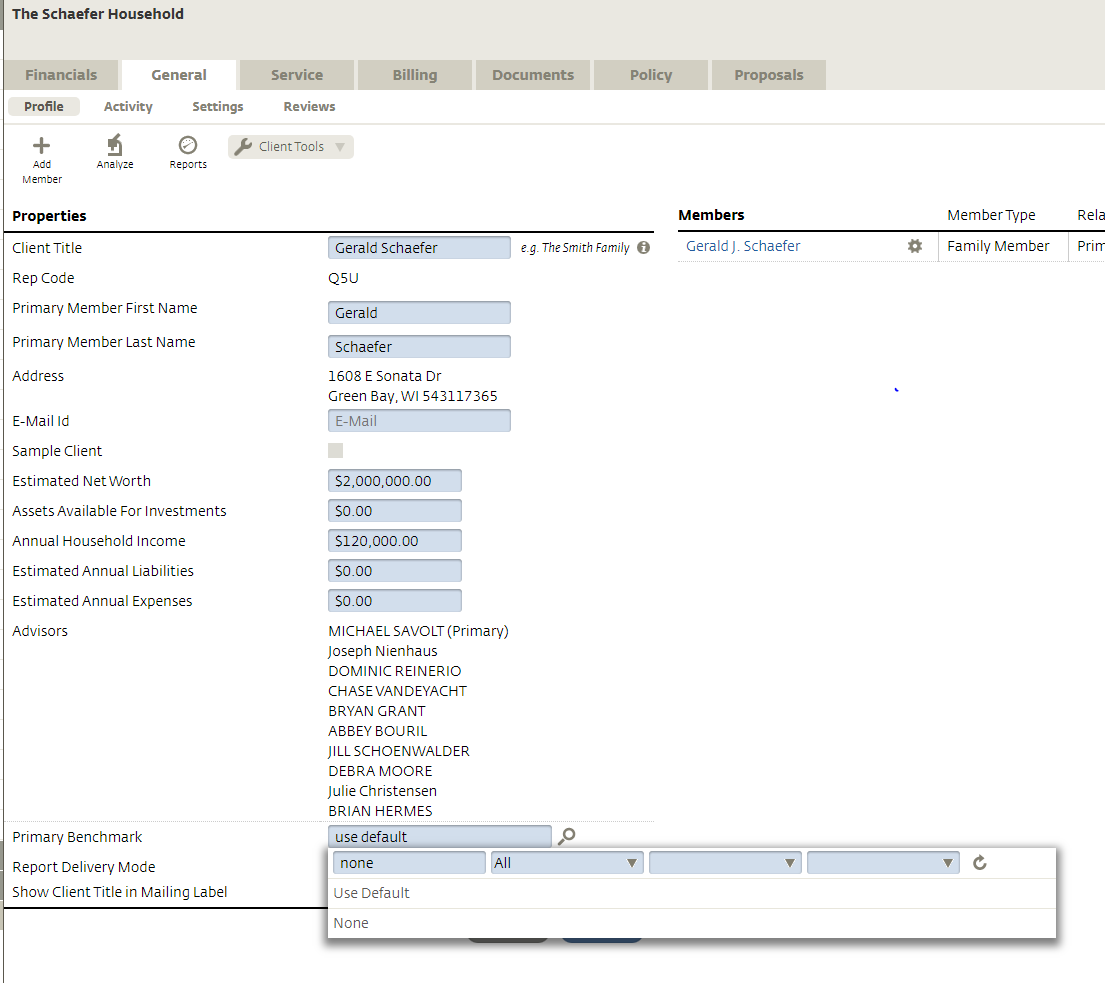
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* 1. The following screen will appear:

Graphical user interface, application

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* + 1. Change the client title to match the format: FirstName1 and FirstName2 LastName.
       1. For example, for clients John Smith and Mary Smith, the title would read “John and Mary Smith”
  1. On the same screen, update the benchmark to None



* + 1. Click the magnifying glass next to the Primary Benchmark
    2. Delete Use Default and type “None” into the box
    3. Click the search icon and select None from the dropdown menu
  1. Click Save. The Primary Benchmark line should state Do Not Show Benchmarks

1. Go to the Financials tab

Graphical user interface, application, table

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* 1. Make sure accounts are titled to match the format: FirstName LastName AccountType
     1. For example, John Smith IRA.
  2. Account Types:
     1. IRA
     2. IRA RO
     3. IRA Beneficiary
     4. IRA Roth
     5. IRA Roth Beneficiary
     6. Individual
     7. TOD
     8. JTWROS
     9. JT TOD
     10. Trust
     11. UTMA FBO Child’s Name
  3. If the titles are not correct, click on each account name

Graphical user interface, text, application, email

Description automatically generated

* + 1. Select Edit
    2. Type the correct title in the Account Name box
    3. Click Save

**References**

N/A

**Revision History**

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| --- | --- | --- |
| **Revision Date** | **Revised By** | **Revision Notes** |
| 11/14/2022 | Katie Weinschenk | Procedure Created |
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