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| **Procedure Name:**  | **Phone Number Update** |  |
| **Department:** | Investment Team |
| **Effective Date:** | 11/14/2022 | **Author:** |  Katie Weinschenk |

**Description**

When a client’s phone number changes, their information needs to be updated and verified in several places.

**Assumptions**

N/A

**Procedure**

1. Add new phone # in Redtail
2. Update phone # in Client Central
3. Verify update on NetX, if applicable
4. Verify update at fund companies, if applicable

**References**

N/A

**Revision History**

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