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

**Description**

When a client notifies us that they have moved, we need to make sure their address is updated in multiple programs and verify the update took place.

**Assumptions**

N/A

**Procedure**

1. Enter new address in Redtail
2. Update address in Client Central
3. Verify address change in OneView
4. Verify address change in WMP, if applicable
5. Verify address change in NetX, if applicable
6. Call all fund companies client holds accounts at and inform them of address change, if applicable **(\*\*Make sure to enter notes in Redtail with fund company names, names of reps & reference numbers for all address changes.\*\*)**
7. Verify all address have changed at direct mutual fund companies
8. If the client is a tax client, put a note in the preparer notepad in Drake with the new address

**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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