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

**Description**

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

**Assumptions**

N/A

**Procedure**

1. Archive old email address in Redtail
2. Add new email address in Redtail
3. Update email in Client Central
4. Verify update in OneView
5. Verify update in WMP, if applicable
6. Verify update in NetX, if applicable

**References**

N/A

**Revision History**

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