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

**Description**

When a client gets married, their marital status needs to change in our systems. Moreover, if there has been a name change, we also need to ensure the client’s name is updated in a timely fashion.

**Assumptions**

N/A

**Procedure**

1. Obtain the marriage license for the couple
2. Confirm if the last name needs to be updated for the spouse
3. Verify the beneficiaries on all accounts for both spouses. If their primary beneficiary is not already their spouse, they will need to sign new beneficiary designations to either update the primary beneficiary or obtain a spousal signoff if the spouse will not be the primary beneficiary
4. Submit the marriage license in ServiceNet and request the marital status(es) be updated as well as any name changes
5. Update the last name, if applicable, in Redtail
6. Update the household and household name in Redtail
7. Complete any applicable name change paperwork
8. Complete new beneficiary designation paperwork for each account. If their primary beneficiary is not already their spouse, they will need to:
   1. sign new beneficiary designations to either update the primary beneficiary or
   2. obtain a spousal signoff if the spouse will not be the primary beneficiary
9. Upload a copy of Name Change paperwork and beneficiary designations into the appropriate account file in Redtail Imaging
10. Upload/mail the paperwork to the fund companies
11. Confirm name changes, marital status updates, and beneficiary changes at fund companies and in Client Central

**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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