

# Modify Contact Information.

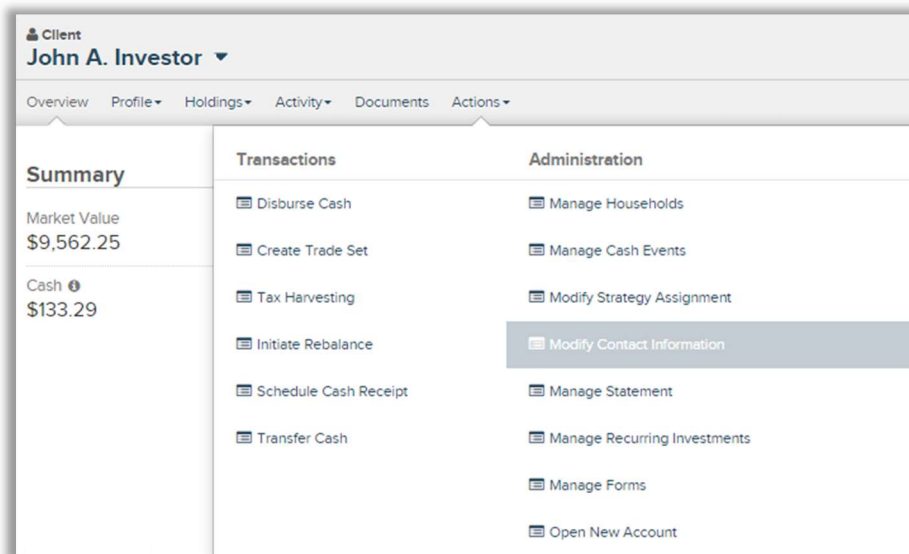


## Modify Contact Information

The **Modify Contact Information** action will allow you to change, add or remove the address, phone number or email address for a client or third party. Changing an existing client address will also update any purpose linked to that existing client address i.e., investor statement or disbursement. An address confirmation letter will be sent to the old and new address.

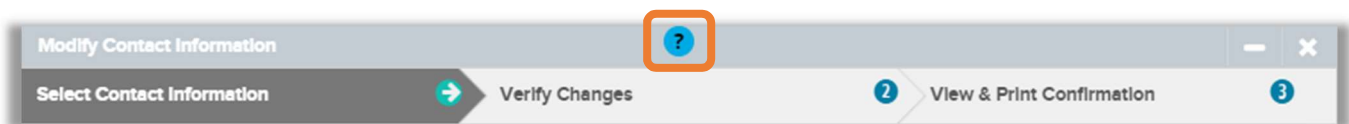
Removing the legal address, the primary phone number or e-mail address with a purpose i.e., investor statement, disbursement, or e-mail address used for the electronic delivery of statements, is unavailable and the option will be grayed out until the purpose is removed. Please contact the Service team at 800-734-1003 in order to remove the purpose.

The **Modify Contact Information** action can be found at the Client or Third Party levels.



## Action Help

Select the Action Help “?” icon for access to this guide, a guided tour, best practice information, and a video walk-thru.



## Select Address, Phone Number, or E-Mail to Change

**Select Contact Information** - Choose the contact type you will be modifying, adding to or deleting. These will include the address, phone number and email address. This top line will stay visible regardless of the contact type (Home, Office, Vacation, etc.) providing you with the ability to perform multiple changes (modifications, additions and deletions) at once.

The screenshot shows a 'Modify Contact Information' window with three tabs: 'Select Contact Information', 'Verify Changes', and 'View & Print Confirmation'. Under 'Select Contact Information', there are four radio buttons: 'Home', 'Office', 'Vacation', and 'Others'. The 'Home' address is selected and shows '1 Freedom Valley Drive, Oaks, PA 19456, United States'. The 'Others' address shows '1 Freedom Valley Drive, Oaks, PA 19456, United States' and an email address 'IASProxy@seic.com'. At the bottom, there are 'Cancel' and 'Next' buttons.

**Legal Address** - If the Legal Address is designated, you will have the ability to modify the address, however you will not be able to delete the address.

This close-up shows the 'Address' section with 'Country' set to 'United States' and 'Address Type' set to 'Home'. The 'Legal Address' checkbox is checked and highlighted with an orange border.

**Related Parties** - If there are purposes assigned to the address, they will be listed underneath the address lines.

The 'Related Parties' section displays 'City' as 'Oaks', 'State' as 'Pennsylvania', and 'Postal Code' as '19456'. Below these are two lists: 'Pay For' and 'Pay To', both containing '- John A Investor B/O Barbara Investor IRA', '- John A Investor IRA', and '- John A Investor TOD'.

## Modify Address, Phone Number, or E-Mail

**Required Information** - Modify any of the information that is needed. Make sure that any item marked with an asterisk (\*) is filled in.

Home Office Vacation

Country\* United States Address Type\* Home Legal Address

Address Line 1\* 123 Sample Address

Address Line 2

Address Line 3

City\* City State\* Pennsylvania Postal Code 19456

Phone Email Address

Country\* United States

Phone Type\* Home Primary

Phone Number\* +1 1234567 Phone Method\* Fax

Email Type\* Home Primary

Email Address\*

Please note that **Modifications to the Legal Address State** may impact the Client's tax residency code and state specific model, if applicable. Changing the state will produce the **Update Tax Residency State** option, which a Yes or No can be selected. If your client is a resident of California, Massachusetts, New Jersey, New York or Pennsylvania and is invested in a strategy that utilizes a state specific municipal bond fund, updating the tax residency state may impact the client's investment model.

City\* City State\* Ohio Postal Code

Update Tax Residency State\*

Yes

Yes

No

ⓘ Tax Residency will be updated.

⚠ Updates to the tax residency state may affect the client's investment profile. To update the client's investment model please select Modify Strategy Assignment in the Actions Menu.

## Add Address, Phone Number, or E-Mail

**Required Information** - Select the plus icon and then add any of the information that is needed. Make sure that any item marked with an asterisk (\*) is filled in.

Home Office Vacation Others

Address

Country\* United States Address Type\* Vacation

Address Line 1\*

Address Line 2

Address Line 3

City\* State\* Postal Code

## Delete Address, Phone Number, or E-Mail

**Required Information** - Select the trash can icon to delete the address, phone number or email address. A **Pending deletion** message will appear.

Phone

Country\* United States Pending deletion

Phone Type\* Vacation Primary

Phone Number\* +1 55! 1234567 Phone Method\* Telephone

## Verify Changes

The **Verify Changes** screen will display the **Current Address, Phone Number or Email Address** and the **Replacement Address, Phone Number or Email Address**, whether a change has occurred and the ability to cancel a modification. This screen is where you can confirm all of the changes you will be making for the client.

- 1 **Previous** - Select the **Previous** button to go back and make changes if needed.
- 2 **Cancel Modifications** - Select **Cancel Modifications** to remove this modification from the action.
- 3 **Submit Modifications** - Selecting the **Submit Modifications** button will advance you to the **View & Print Confirmation** page.

| Current Address                                                   | Replacement Address                                 | Change | Address / Purpose                                                                                        |
|-------------------------------------------------------------------|-----------------------------------------------------|--------|----------------------------------------------------------------------------------------------------------|
| Address<br>1 Freedom Valley Drive<br>Oaks, PA 19456 United States | Address<br>123 Address Oaks, PA 19456 United States | Yes    | Pay For:<br>- John A Investor B/O Barbara Investor IRA<br>- John A Investor IRA<br>- John A Investor TOD |
| Relationship / Purpose<br>Legal                                   | Relationship / Purpose<br>Legal                     | -      | Pay To:<br>- John A Investor B/O Barbara Investor IRA<br>- John A Investor IRA<br>- John A Investor TOD  |
| Address Type<br>Home                                              | Address Type<br>Home                                | -      |                                                                                                          |

## View & Print

**Print Confirmation** - The **View & Print Confirmation** screen will provide a confirmation page, which can be printed for your records. Activity IDs are not generated for **Modify Contact Information** unless they require an approval. If there are no approvals needed, the **Address, Phone Number or Email Address** will immediately update.

| Current Address                                                   | Replacement Address                                            | Change | Address / Purpose |
|-------------------------------------------------------------------|----------------------------------------------------------------|--------|-------------------|
| Address<br>1 Freedom Valley Drive<br>Oaks, PA 19456 United States | Address<br>1 Freedom Valley Drive Oaks, PA 19456 United States | Yes    |                   |
| Relationship / Purpose<br>Legal                                   | Relationship / Purpose<br>Legal                                | -      |                   |
| Address Type<br>Home                                              | Address Type<br>Home                                           | -      |                   |