Details Tab

Record Summary

- ☐ Record Type
- ☐ Advisor 1 (Advisor 2, CSR)
- ☐ Referred By
- ☐ Referred Date
- ☐ Referred Source
- ☐ Termination Date (when applicable)
- ☐ Termination Reason (when applicable)
- ☐ Termination Amount (when applicable)
- ☐ Classification
- □ Tags

Person Summary

- ☐ Relationship to Record
- ☐ First Name
- ☐ Last Name
- ☐ Birthday
- ☐ Birthday List

Contact Info

- ☐ Primary Record Address
- ☐ Primary Record Email
- ☐ Primary Record Phone Number

Interests and Favorites

- □ Interests
- □ Favorites

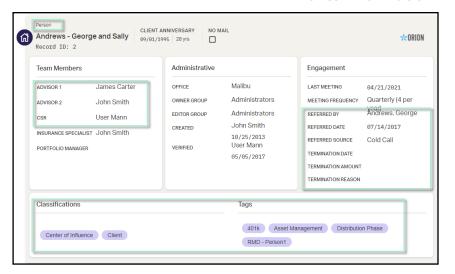
Identification

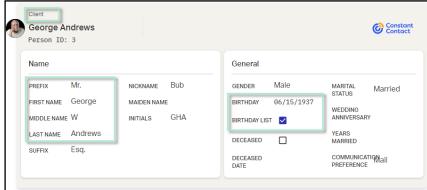
- ☐ Social Security Number
- ☐ State of Residence

Financial Engagement

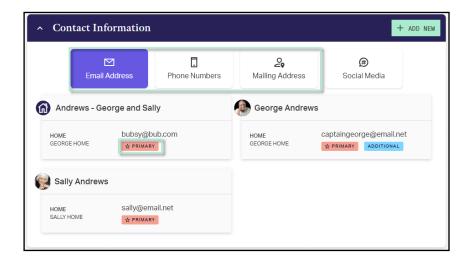
- ☐ IPS Statement Date
- ☐ Financial Planning Contract Date
- ☐ Investment Management Contract Date

Profile Information





Contact Information



/≡ AdvisorEngine

Important Fields Best Practice Guide

ADDITIONAL FIELDS

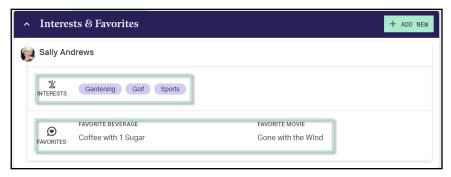
Take time as a firm to review all the areas of a Record in detail. Determine what information will be vital to you for reference and reporting later on. Make a note here of which other fields are important based on your needs and use.

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ADDITIONAL TIPS

- The fields that are important will vary based on the use for the Record. Create different "important fields" lists for different types of Records (such as prospect, strategic partners, or vendors).
- Create an important field data check report using the Report Assistant to show Records where important fields have been left blank.
- Create a Recurring Action Definition on your Office Record that reminds someone to run the above mentioned report on a regular basis (recommended quarterly).

Interests and Favorites



Identification



Financial Engagement

