

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

Person

Andrews - George and Sally

Record ID: 2

CLIENT ANNIVERSARY
09/01/1995 | 28 yrs

NO MAIL
☐

ORION

Team Members

ADVISOR 1James Carter

ADVISOR 2John Smith

CSRUser Mann

INSURANCE SPECIALISTJohn Smith

PORTFOLIO MANAGER

Administrative

OFFICEMailbu

OWNER GROUPAdministrators

EDITOR GROUPAdministrators

CREATEDJohn Smith
10/25/2013
User Mann

VERIFIED05/05/2017

Engagement

LAST MEETING04/21/2021

MEETING FREQUENCYQuarterly (4 per year)

REFERRED BYAndrews, George

REFERRED DATE07/14/2017

REFERRED SOURCECold Call

TERMINATION DATE

TERMINATION AMOUNT

TERMINATION REASON

Classifications

Tags

Center of Influence

Client

401K

Asset Management

Distribution Phase

RMD - Person1

Client

George Andrews

Person ID: 3

Constant Contact

Name

PREFIXMr.

NICKNAMEBub

FIRST NAMEGeorge

MAIDEN NAME

MIDDLE NAMEW

INITIALSGHA

LAST NAMEAndrews

SUFFIXEsq.

General

GENDERMale

MARITAL STATUSMarried

BIRTHDAY06/15/1937

WEDDING ANNIVERSARY

BIRTHDAY LIST☒

YEARS MARRIED

DECEASED☐

DECEASED DATE

COMMUNICATION PREFERENCEMail

Contact Information

Contact Information

+ ADD NEW

Email Address

Phone Numbers

Mailing Address

Social Media

Andrews - George and Sally

HOME

GEORGE HOME

bubsy@bub.com

☆ PRIMARY

George Andrews

HOME

GEORGE HOME

captaingeorge@email.net

☆ PRIMARY

ADDITIONAL

Sally Andrews

HOME

SALLY HOME

sally@email.net

☆ PRIMARY



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.

[illegible]

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


^

Interests & Favorites

+ ADD NEW



Sally Andrews




INTERESTS

Gardening

Golf

Sports



FAVORITES

FAVORITE BEVERAGE

Coffee with 1 Sugar

FAVORITE MOVIE

Gone with the Wind

Identification

<

Identification

George Andrews

GENERAL

SSN
-**-*

STATE OF RESIDENCE
CA

COUNTRY OF CITIZENSHIP
USA

Financial Engagement

Financials > Financial Engagement

Discretionary : ☒

Investment Policy Statement Date : 09/22/1995

Financial Planning Contract Date : 09/27/1995

Investment Management Contract Date : 04/16/2000

Additional Form Date :

Risk Questionnaire Date : 09/22/1995

Liquid Net Worth : \$250,000.00

Annual Income : \$100,000.00

Overall Net Worth : \$1,000,001 - \$1,500,000

Overall Risk Tolerance : Moderate

Overall Investment Experience : Good

Overall Investment Objective : Capital Preservation

EDIT

Visit crmsupport.advisorengine.com for our entire knowledge base or to reach out for further assistance.