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Elevate help guide Updating client details

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Updating client details

You can update and amend client details and contact information on Elevate.

What you will see

The screenshot shows the 'Account Details' page in the Elevate system. The page is divided into several sections, each with an 'Edit' button:

- Account Details:** Includes an 'Edit' button.
- Client Details:** Includes an 'Edit' button and a 'Save' button. This section contains the following information:
 - Title: Mr
 - First Name(s): Anon
 - Surname: Client 41788
 - Marital Status: Single
 - National Insurance Number: AA123456A
 - No National Insurance Number: No
 - Gender: Male
 - Date of Birth: 25-Mar-1980
 - Dependent of a deceased pension scheme member: No
 - Country of Nationality: UK
 - UK Resident for Tax purposes: Yes
 - Risk Rating: 5 - Adventurous (1-7 scale)
 - Date Risk Rating Applied: 14-Mar-2014
- Addresses:** Includes an 'Edit' button and 'Save'/'Cancel' buttons. This section contains the following information:
 - Residential address:
 - Line 1: 1 Test Road
 - Line 2: Test Town
 - Line 3: Testville
 - Line 4: Bristol
 - Postcode: TE1 5ST
 - Country: UK
- Contact Information:** Includes an 'Edit' button and 'Save'/'Cancel' buttons. This section contains the following information:
 - Home Phone: 01179000001
 - Work Phone: 01179000002
 - Mobile Phone: 01179000003
 - Fax Number:
 - Preferred Email Address: anonymous.client@test.co.uk
 - Confirm email address:
 - Preferred Phone Number: Mobile
- Client Access:** Includes an 'Edit' button. This section contains the following information:
 - Client Internet Access: No Client Access
 - Opt client out of receiving paper: No

What you will need to do

1. In the client's account, go to **Account Holders > Account Details**.
2. Click **Edit** next to **Client details**.
3. Make the amendments you require.
4. Click **Save**.

You can repeat this process for **Addresses** and **Contact Information** by going to **Account Holders > Contact Details**.

Notes

4. You will be asked to confirm information you have updated is correct.

Hints and tips

- You can save evidence when changing address, name and date of birth to the clients **Reports and Documents** tab. This is useful for your audit trail (we might also check for this evidence from time to time as part of our audits).
- We can only accept the clients' current residential and postal address. **PO Boxes, Care-of and Adviser firm addresses must not be entered.**
- Under **Client Access** in **Account Holders > Contact Details**, you can set up your client with on-line access to view their account and set their paperless preference.
- Clients who already have on-line access to view their account can set their own paperless preferences by navigating to **My Details** when they are logged in.

If there is anything more you want to know, please contact us.

Call us on 0333 006 3520

Our lines are open 9am to 5pm, Monday to Friday. Call charges may vary.

Email us at Elevate_Enquiries@aberdeenplc.com

Emails are not secure as they can be intercepted, so please don't send personal or confidential information in this way.

Address

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For more information visit aberdeenadviser.com

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