

For financial adviser use only.

It should not be distributed to, or relied upon by, retail clients.

Elevate help guide: Updating client details

Standard Life

There's a lot to look forward to

Updating client details

What you will see

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

The screenshot shows the Elevate interface for updating client details. It is divided into several sections, each with an 'Edit' button and a 'Save' button. The sections are:

- Account Details:** Includes fields for Title, First Name(s), Surname, Marital Status, National Insurance Number, No National Insurance Number, Gender, Date of Birth, Dependent of a deceased pension scheme member, Country of Nationality, UK Resident for Tax purposes, Risk Rating, and Date Risk Rating Applied.
- Addresses:** Includes fields for Residential address (Line 1-4), Postcode, and Country.
- Contact Information:** Includes fields for Home Phone, Work Phone, Mobile Phone, Fax Number, Preferred Email Address, Confirm email address, and Preferred Phone Number.
- Client Access:** Includes fields for Client Internet Access and Opt client out of receiving paper.

Numbered callouts indicate the steps: 1. Click on the 'Account Holders' tab. 2. Click the 'Edit' button next to 'Client Details'. 3. Make the amendments you require. 4. Click the 'Save' button.

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.

Get to know us better

We hope you've got a good insight into our platform and the potential benefits it can bring to you and your firm.

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

Call us on 0345 600 2399

Our lines are open 8am to 6pm, Monday to Friday. As part of our commitment to quality service and security, telephone calls may be recorded.

Email us at Elevate_Enquiries@standardlife.com

Please be aware that emails are not secure as they can be intercepted, so think carefully before sharing personal or confidential information in this way.

Address

Elevate, PO Box 6877, Basingstoke, RG24 4RT

elevateplatform.co.uk

Elevate Portfolio Services Limited trades as Elevate and is part of Standard Life Aberdeen Group.

Elevate Portfolio Services Limited is registered in England (01128611) at 14th Floor 30 St Mary Axe, London, EC3A 8BF and is authorised and regulated by the Financial Conduct Authority. www.elevateplatform.co.uk

SLE0121 0620 © 2020 Standard Life Aberdeen, reproduced under licence. All rights reserved.