For financial adviser use only.

Elevate help guide
Updating client details

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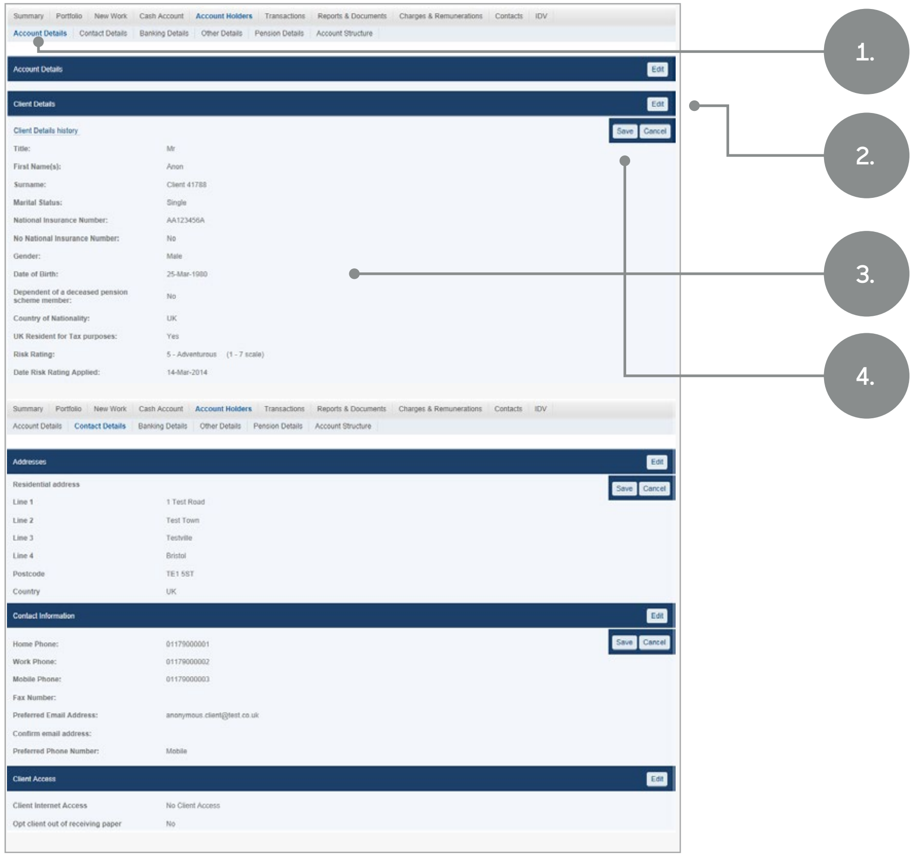
Updating client details

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

What you will see



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 y
ou 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 0333 006 3520
Our lines are open 9am to 5pm, Monday to Friday. Call charges may vary.

Email us at Elevate_Enquiries@abrdn.com
Emails are not secure as they can be intercepted, so please don't send personal or confidential information in this way.

Address
Elevate, PO Box 6877, Basingstoke, RG24 4RT

For more information visit abrdn.com/adviser

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