Contact List -> Contact Info (Reference from Nick)

emX   Offices   Users   Contacts   Reports ▾   Tools ▾   Advisor Branded Marketing ▾   Settings   Sign Out

◎ Go back to Contacts List
Edit Contact: Tom Anderson

Contact Settings	**Contact Info**

Connections
Contact Info
Employment Info
Integrations
Single Sign Ons
Third Party IDs

Website Settings
2-Factor Authentication
User Account

First Name

Last Name

Date of Birth (optional)

Email

Phone

Secondary Phone (optional)

Fax Number (optional)

Relationship Status
Married

Spouse's First Name

Spouse's Last Name

Date of Birth

Spouse's E-mail

Address Line 1
*Street Address, P.O. Box
Address Line 2 (optional)
*Apartment, Suite, Building, Floor, etc.

City   State   ZIP Code
PA

Reset to Default   Save

Fact Finder -> Family -> Client & Spouse -> Basic Info

Frank and Joanna Miller

| **Basic** | Contact Info | Employment Info | Additional Info | Notes | ❯ |

First Name   **Last Name**

Date of Birth   **Gender**
Enter a date 📅   Select ▾

Marital Status
Select ▾

Citizenship
Select ▾

☑ In Good Health?   ☐ Special Needs?   ☐ Previous Marriages?

Help
Adding **Frank and Joanna Miller's** personal information helps you manage your client relationship.
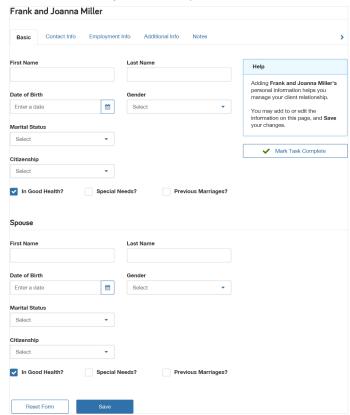
You may add to or edit the information on this page, and **Save** your changes.

✓ Mark Task Complete

Spouse

First Name   **Last Name**

Date of Birth   **Gender**
Enter a date 📅   Select ▾

Marital Status
Select ▾

Citizenship
Select ▾

☑ In Good Health?   ☐ Special Needs?   ☐ Previous Marriages?

Reset Form   Save

Fact Finder -> Family -> Client & Spouse -> Contact Info

Frank and Joanna Miller

| Basic | **Contact Info** | Employment Info | Additional Info | Notes | ❯ |

Address

City   **State**   **Zip**
Select ▾

Phone/Fax Number   **Type**
Home ▾ ➕

Email Address
➕

Home
Cell
Spouses' Cell
Work
Spouses' Work

Help
This page provides contact information for Frank and Joanna Miller.

A valid email address is important for your client to retrieve a lost client website password automatically.

✓ Mark Task Complete

Reset Form   Save

Fact Finder Existing -> Basic

Frank and Joanna Miller

| **Basic** | Contact Info | Employment Info | Additional Info | Notes |

Client
Name (first/last): Frank   Miller
Date of Birth: 6/1/1967
Gender: Male ▾
Special Needs? No ▾
In Good Health? Yes ▾
Marital Status: Domestic Partnership ▾
Previous Marriages? ▾
Citizenship: ▾

Spouse
Name (first/last): Joanna   Miller
Date of Birth: 3/20/1968
Gender: Female ▾
Special Needs? No ▾
In Good Health? Yes ▾
Previous Marriages? Yes ▾
Citizenship: ▾

Help
Adding **Frank and Joanna Miller's** personal information helps you manage your client relationship.

You may add to or edit the information on this page, and **Save** your changes.

Reset   Save   ☐ Task Completed

Fact Finder Existing -> Contact

Frank and Joanna Miller

| Basic | **Contact Info** | Employment Info | Additional Info | Notes |

Address:
City, State, Zip:
Home Phone:
Cell Phone:
Spouse Cell Phone:
Fax:
E-mail:
Spouse E-mail:

Help
This page provides contact information for Frank and Joanna Miller.

A valid email address is important for your client to retrieve a lost client website password automatically.

Reset   Save   ☐ Task Completed