Invesco US_CONTACT MANAGEMENT		
FIELD	**INSTRUCTION**	**ADDITIONAL NOTES**
Type	Default: Contact Management	**Contact Management note type is used for the following:** **1. Profile creation** **2. Profile update** *** Change of Address/Firm** *** if the Contact Record type is Prospect or Advisor, put in internal comments - Send to CDS** *** if the Contact Record type is Non Advisor, proceed with updating address** *** Change of other contact information (email address, phone number)** *** Adding of PDF files**
Internal Comment	Type in any observation, clarification, instruction that could be useful for the person who will enter the note	
Special Instructions	As specified	
First Name	As specified or copy name from CRM	
Last Name	As specified or copy name from CRM	
CRD	Copy from CRM. If for profile creation, copy from FINRA ***FOR ADDING PDF files, no need to add crd	
Location	As specified or leave blank if not provided	
Text	Type in relevant information for profile creation/updates (phone number, email address, etc.)	
Count Cross-check	1	