Invesco US_FOLLOW UP		
FIELD	**INSTRUCTION**	**ADDITIONAL NOTES**
Task Description and Comments	If the recording/note if from the HD App or click the + sign beside Task Description and Comments and type the FA name under Task Description. If there are multiple FAs or multiple notes under 1 task, type in the 1st FA name, et al.	
Type	Default: Follow Up	
Internal Comment	Type in any observation, clarification, instruction that could be useful for the person who will enter the note	
Special Instructions	As specified	
Date	As specified or next business day. Also check WS Preference for due dates	
Time	Skip if not provided	***DEFAULT APPOINTMENT TIME: (you can leave it blank but make sure to manually adjust it in Salesforce after SIT) Breakfast - 8AM Lunch - 12PM Dinner - 6PM Happy Hour – 4PM
Advisors	As specified	MAXIMUM OF 50 CONTACTS. If more than 50 contacts, create a new note and under subject (Part 1 of ?) * Best to use Regions + Last Name when searching for contacts to filter correct profiles. (Once profile has been selected, it will be highlighted in orange and will

		automatically be added to the table below). *If WS provides the Team name only, type it in the Advisors field. Then search for the team name in SF and add the names individually. * Make sure profiles added have Active status.
Subject	As specified.	DEFAULT: Follow-Up. Also check WS Preference for default subject
Text	Capture follow-up notes or check WS' Preference	**DEFAULT**: Follow up.
Activity Type	Select as specified.	Default: Telephone
Activity Subtype	Select as specified.	Default: Outbound Live
Task Record Type	If the ff-up is for the Internal, use Retail Internal (Check latest team sheet for name of Internal. If it is for the WS, check his/her Event Record Type under WS Preference	
Activity Priority	Leave blank if not specified	
Assigned to:	Name of WS or Internal	
Meeting Location	Leave blank	
Programs	As specified or check WS' Preference *Leave blank if none provided or mentioned*	
Product	As specified or check WS' Preference (Note:**Maximum of <u>5 products</u>**) *Leave blank if none provided or mentioned*	
Activity Status	Leave blank if not specified or put Not Started	

Follow-Up VA	Leave blank if not specified	
Purpose		
Retirement Platform		
Tool		
Tool Subtype		
Count Cross-check	1	