Invesco US_BUSINESS COACHING		
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: I-GC Engagements	These are notes sent by Business Coaches
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. If not provided, use recording date and send clarification email	***Time not required
Name	IVZ Employee	*****Use name of the WS. If it was not specifically mentioned, go over the notes. If the WS name was not provided, use the name of the Business Coach***
Text	Transcribe as dictated	
Event	As specified. If not provided, send clarification email	
Meeting #	As specified. If not provided, double check other activities from CRM	
Financial Advisor	FA Name; CRD #	
Count Cross-check	New = 2 All other Meeting Types = 1	