Invesco US_Private Markets		
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: SMA Engagements	These are notes sent by SMA Specialists
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	As specified. Leave blank if not provided	
Subject	Leave blank. Put Subject on Text field if provided. Subject: ******** (Notes)	
Name	FA Name/s	
Text	Transcribe as dictated/specified on spreadsheet	***If subject is provided, see additional notes for Subject
Event	As specified. Clarif if not provided.	
Meeting #	Leave blank	
Consultant	As specified	***They are Market Leaders (previously called SAC)
Team Name	As specified. Leave blank if not provided	
SMA Primary Suite	As specified.	

SMA Suite 2	As specified.	
SMA Suite 3	As specified.	
SMA Suite 4	As specified.	
SMA Suite 5	As specified.	
SMA Specialist Request Case	As specified. Leave blank if not provided	
Count Cross-check	1	