Email Return – Silver

Task Description and Comments	[FA Name] – [Firm] = 1 contact [FA 1 & FA 2] – [Firm] = 2 contacts [FA 1 & Others] = 3 or more contacts or recordings with multiple notes	**Required**
Type	Email Return (fixed)	**Not Required**
Special Instructions	Put here any special instructions to take note from the wholesaler.	**Not Required**
Internal Comments	Put here additional information that will help with processing the note. BEST PRACTICE is to put the contact name found on FINRA here to check for spelling errors.	**Not Required**
Note Timezone	Skip	**Not Required**
Group	Check this box if the note has more than one contacts.	**Required**
Group Follow-up	Skip	**Not Required**
Date	As dictated. Use the received date in DANA if none.	**Required**
Time	**If specified, please add to Description box below the name – firm name line	**Not Required**
Date Time Finish	**If specified, please add to Description box below the name – firm name line	**Not Required**
Interval	Skip	**Not Required**
Contact	Input the details dictated by the wholesaler. • First name, last name as specified • Organization – Firm name as specified • Location – City name, state abbreviation	**Required**
Type	Skip	**Not Required**
Sub Type	Skip	**Not Required**
Subject	Skip	**Not Required**
Description	[First and Last name] – [Firm name] ***(Place time here if specified)* Clean verbatim transcription	**Required**