

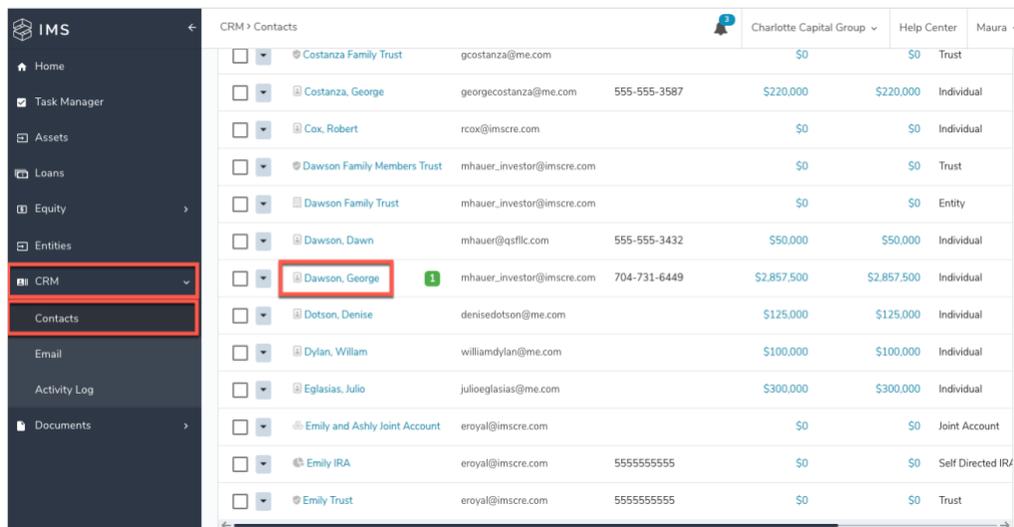
## Edit Investor Profile Connections (Updated 06/11/2018)

### Terms To Know:

**Responsible Party:** Has full dashboard and document access as well as the ability to update profile information and place an investment within IMS.

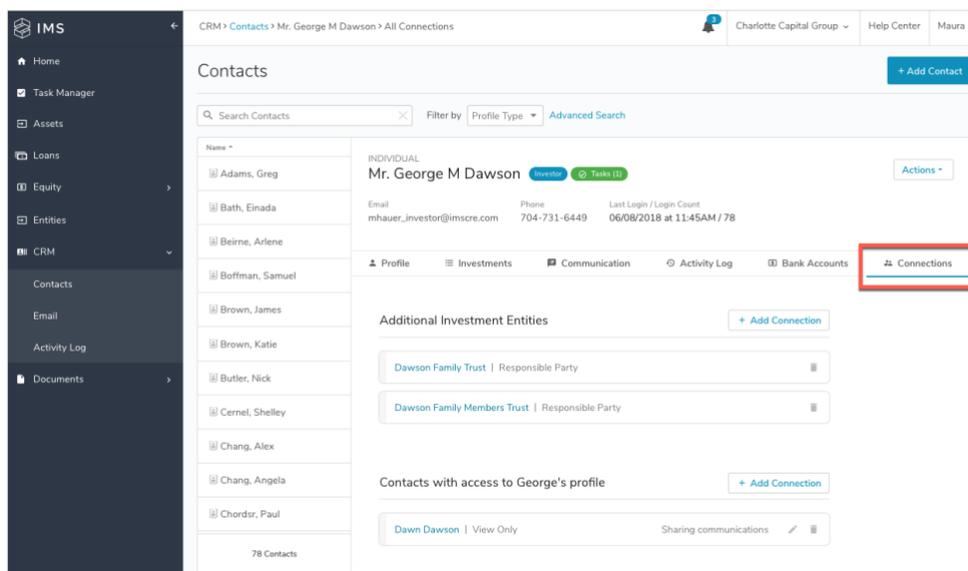
**Secondary/View Only:** This party can update profile information but cannot place an investment within IMS. This user can still update profile information and place investments under their own profile or any profiles where they are the responsible party.

Step 1: Click the **CRM** tab on the left side of the screen. Click **Contacts**. Search and locate your desired contact. Click their name.



Profile Type	Name	Email	Phone	Investment	Balance	Entity Type
Trust	Costanza Family Trust	gcostanza@me.com		\$0	\$0	Trust
Individual	Costanza, George	georgecostanza@me.com	555-555-3587	\$220,000	\$220,000	Individual
Individual	Cox, Robert	rcox@imscre.com		\$0	\$0	Individual
Trust	Dawson Family Members Trust	mhauer_investor@imscre.com		\$0	\$0	Trust
Entity	Dawson Family Trust	mhauer_investor@imscre.com		\$0	\$0	Entity
Individual	Dawson, Dawn	mhauer@qfflc.com	555-555-3432	\$50,000	\$50,000	Individual
Individual	Dawson, George	mhauer_investor@imscre.com	704-731-6449	\$2,857,500	\$2,857,500	Individual
Individual	Dotson, Denise	denisedotson@me.com		\$125,000	\$125,000	Individual
Individual	Dylan, William	williamdylan@me.com		\$100,000	\$100,000	Individual
Individual	Eglasias, Julio	julioeglasias@me.com		\$300,000	\$300,000	Individual
Joint Account	Emily and Ashly Joint Account	eroyal@imscre.com		\$0	\$0	Joint Account
Self Directed IRA	Emily IRA	eroyal@imscre.com	5555555555	\$0	\$0	Self Directed IRA
Trust	Emily Trust	eroyal@imscre.com	5555555555	\$0	\$0	Trust

Click the **Connections** tab. This tab lists the additional users with access to the profile you're in.



**Contacts**

Search Contacts:  Filter by: Profile Type  Advanced Search

Name: Mr. George M Dawson (Investor) (Tasks (1))

Email: mhauer\_investor@imscre.com Phone: 704-731-6449 Last Login / Login Count: 06/08/2018 at 11:45AM / 78

Profile | Investments | Communication | Activity Log | Bank Accounts | **Connections**

**Additional Investment Entities** + Add Connection

- Dawson Family Trust | Responsible Party
- Dawson Family Members Trust | Responsible Party

**Contacts with access to George's profile** + Add Connection

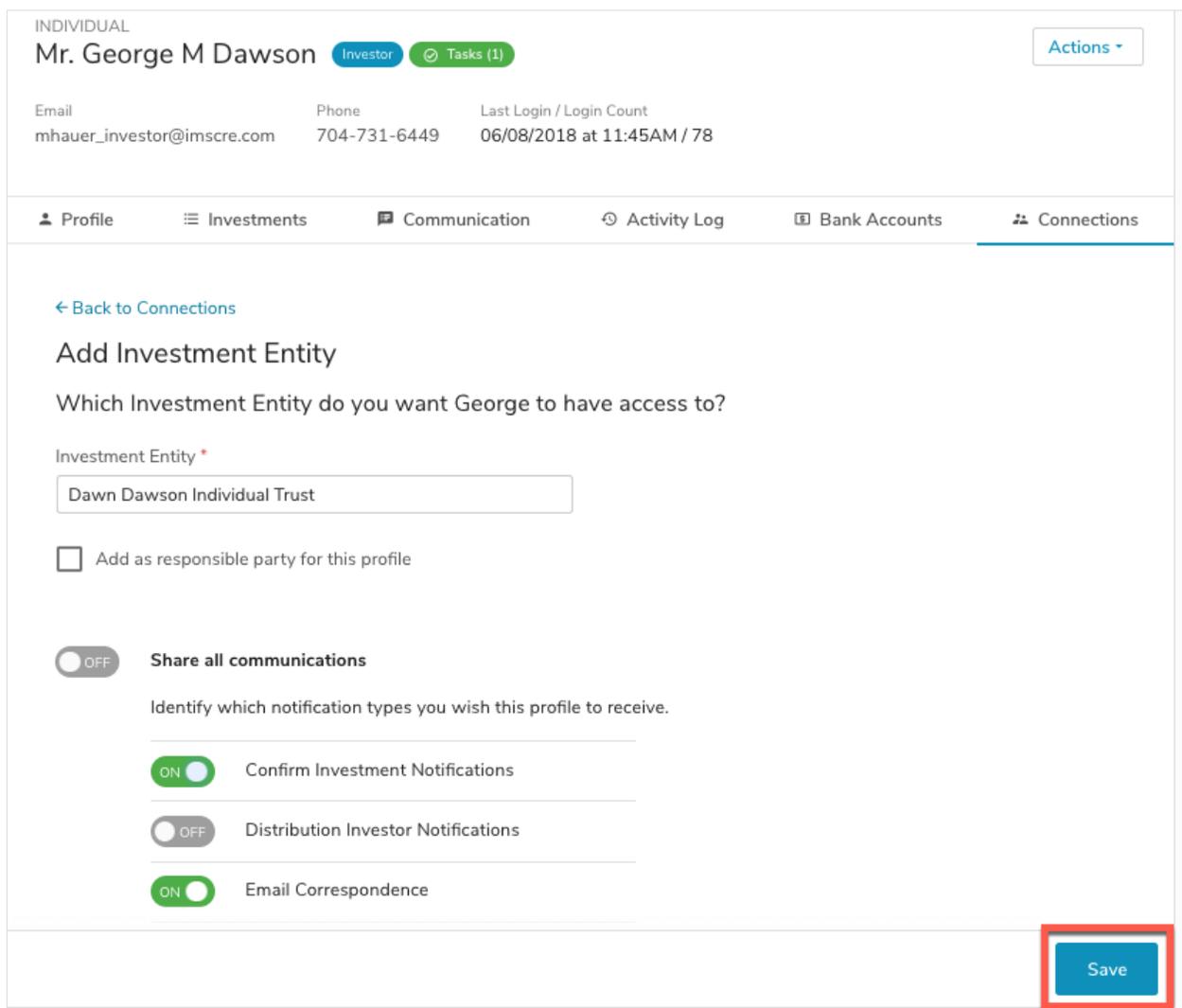
- Dawn Dawson | View Only | Sharing communications

78 Contacts

The Additional Investment Entities section allows you to add an entity that you would like that contact (in this example, George) to have access to. To add a profile for this contact, click **+ Add Connection**.



Here, you have the option to choose any communications that you would like this contact (ex: George) to receive along with the entity. Click **Save**.



INDIVIDUAL

Mr. George M Dawson Investor Tasks (1) Actions ▾

Email: mhauer\_investor@imscre.com | Phone: 704-731-6449 | Last Login / Login Count: 06/08/2018 at 11:45AM / 78

[Profile](#) [Investments](#) [Communication](#) [Activity Log](#) [Bank Accounts](#) [Connections](#)

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### Add Investment Entity

Which Investment Entity do you want George to have access to?

Investment Entity \*

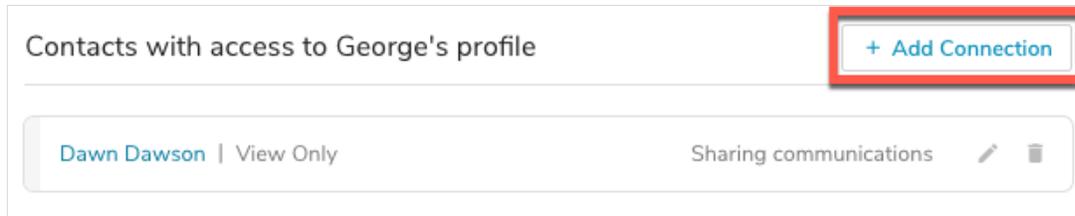
Add as responsible party for this profile

OFF **Share all communications**  
Identify which notification types you wish this profile to receive.

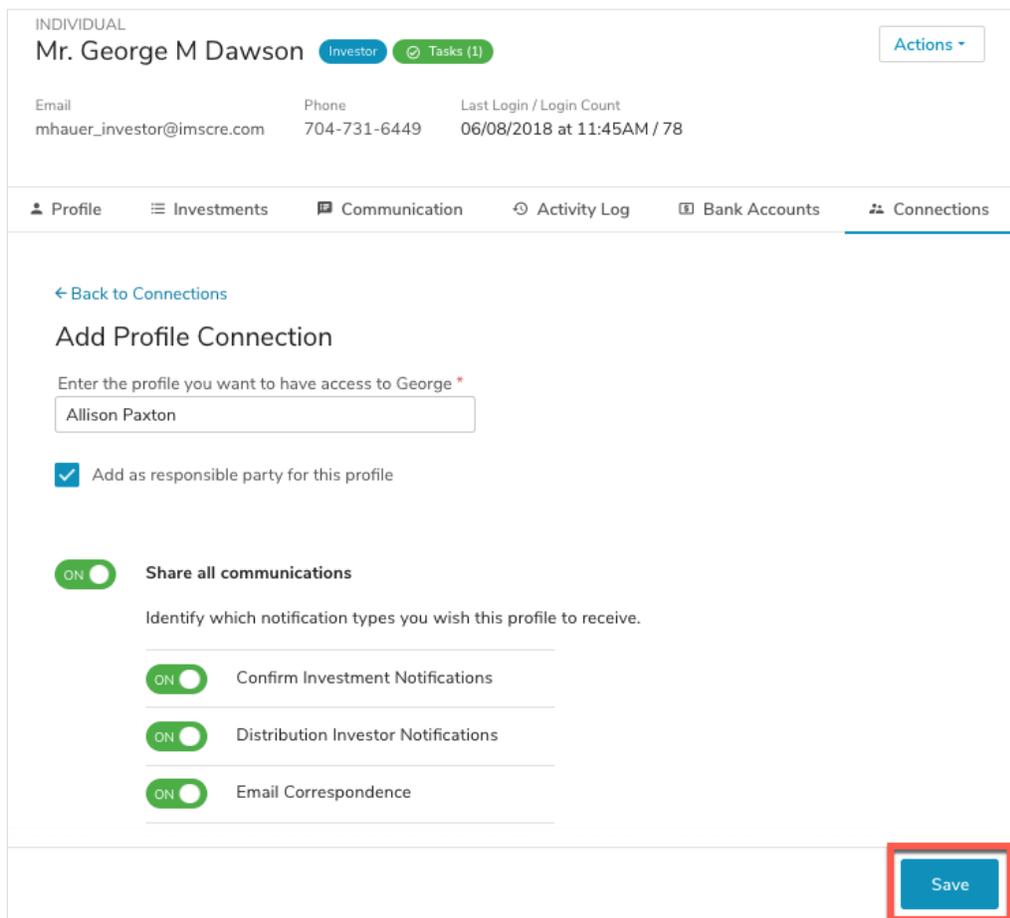
- ON Confirm Investment Notifications
- OFF Distribution Investor Notifications
- ON Email Correspondence

Save

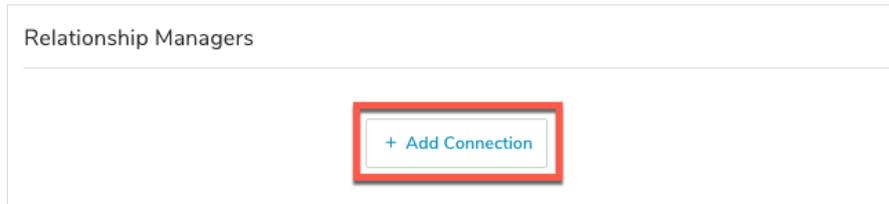
The Contacts with access to George’s profile section allows you to link additional profiles to George’s user account (ex: George). If you would like to give this user access to a new profile, click **+ Add Connection**.



When connecting a profile, you have the option to check a box to mark that the contact (ex: George) the responsible party for this profile. If this box is left unchecked, that contact (ex: George) will have View Only (Secondary) access to this profile. When you pick this profile, you have the option to check a box to mark that the contact (ex: Allison) will share communications with this profile and the option to specify which communication you would like to be shared. For more information on this shared communication, visit our release notes on this feature [here](#). If this box is toggled to “off”, that contact (ex: George) will not receive shared communications for that profile (ex: Allison). Click **Save**. If you have any questions regarding Responsible Party or Secondary/View Only, please review the definitions at the top of this PDF.



This tab also includes the ability to add Relationship Managers (any internal team members). Click **+ Add Connection**.



Choose the Relationship Manager (any team member), Relationship (Primary or Secondary), and any Relationship Manager Tags (ex: Broker, Advisor, Relationship Manager). Click **Save**.

CRM > [Contacts](#) > Mr. George M Dawson > Add Relationship Manager Charlotte Capital Group ▾ Help Center Maura ▾

**Contacts** + Add Contact

Search Contacts  Filter by Profile Type ▾ [Advanced Search](#)

Name ▾	INDIVIDUAL	Actions ▾
Adams, Greg	<b>Mr. George M Dawson</b> <span style="background-color: #0070c0; color: white; padding: 2px;">Investor</span> <span style="background-color: #4caf50; color: white; padding: 2px;">Tasks (1)</span>	
Bath, Einada	Email: mhauer_investor@imscre.com Phone: 704-731-6449 Last Login / Login Count: 06/08/2018 at 11:45AM / 78	
Beirne, Arlene		
Boffman, Samuel		
Brown, James		
Brown, Katie		
Butler, Nick		
Cernel, Shelley		
Chang, Alex		
Chang, Angela		
79 Contacts		

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### Add Relationship Manager

Which Relationship Manager do you want to have access to George?

Relationship Manager \*  Relationship \*

Relationship Manager Tags \*

Save