

iSolved: Contact Information or Name Update

Options for these two updates are located in different areas of iSolved but both are documented here.

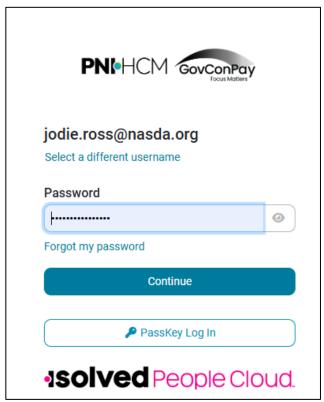
Updates include:

Contact Information Update: Address, phone number, e-mail

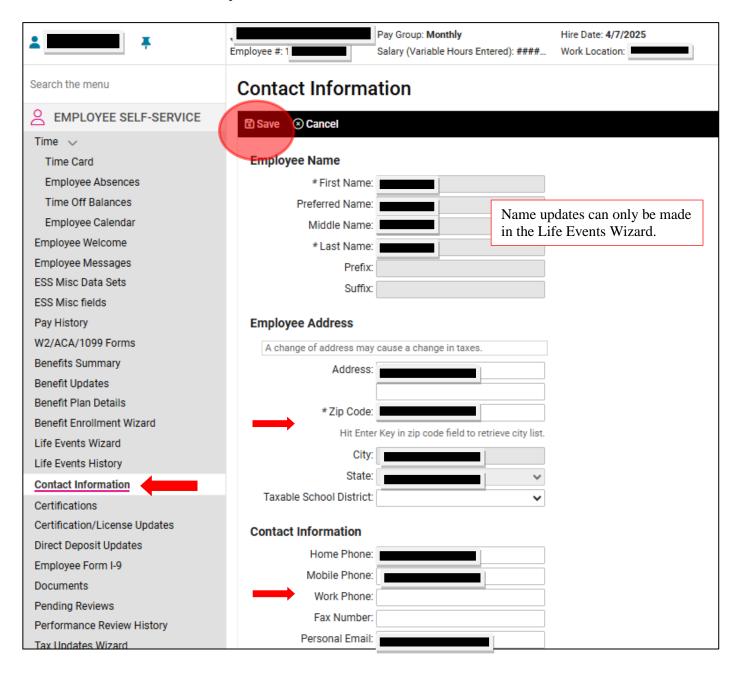
Name Update: Marriage/Divorce

1. Access iSolved.

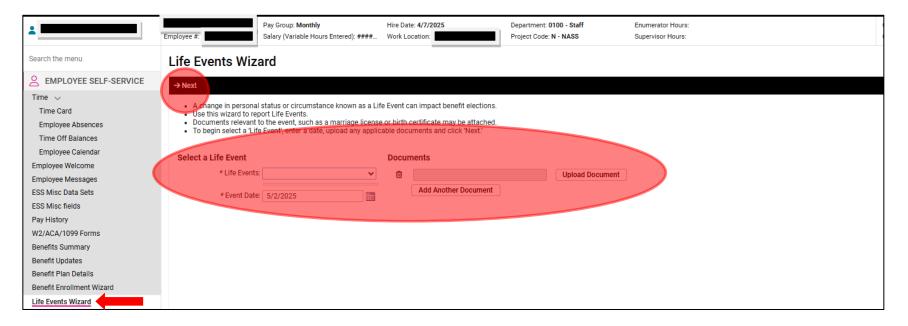
2. Log into iSolved.



3. Select 'Contact Information' from the drop-down list on the left side of the screen. In this area updates can be made to the address, phone or e-mail. Name updates can only be made in the Life Events Wizard. Step 4 will outline the Life Events Wizard. After updates are made click 'SAVE'.



4. Select 'Life Events Wizard' from the drop-down list on the left side of the screen. Use the drop down to select the life event and event date. Upload documents supporting the update. Click on Next.



5. Click through the remaining life event screens answering all questions. Remember to 'SAVE'.