

How to: Update My Contact Information

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Update My Contact Information

See below on how to let us know that your address, phone number, or email address has changed and is needing to be updated on your accounts.

Update My Address

Step 1: Send an email to clientsuccess@financialgravity.com letting us know the new address.

Step 2: Our team will prepare the appropriate paperwork for your accounts to have this updated.

Step 3: Our team will update our internal systems to ensure your address is reflected accurately.

Step 4: An email reply will be sent to you letting you know what forms are needed and how we will be sending them to you along with additional instructions if necessary.

Step 5: Once all of your accounts have been updated, our team will notify you via email that the changes have been made.

Update My Phone Number

Step 1: Send an email to clientsuccess@financialgravity.com letting us know the new phone number.

Step 2: Our team will prepare the appropriate paperwork for your accounts to have this updated.

Step 3: Our team will update our internal systems to ensure your phone number is reflected accurately.

Step 4: An email reply will be sent to you letting you know what forms are needed and how we will be sending them to you along with additional instructions if necessary.

Step 5: Once all of your accounts have been updated, our team will notify you via email that the changes have been made.

Update My Email Address

Step 1: Send an email to clientsuccess@financialgravity.com letting us know the new email address.

Step 2: Our team will prepare the appropriate paperwork for your accounts to have this updated.

Step 3: Our team will update our internal systems to ensure your email address is reflected accurately.

Step 4: An email reply will be sent to you letting you know what forms are needed and how we will be sending them to you along with additional instructions if necessary.

Step 5: Once all of your accounts have been updated, our team will notify you via email that the changes have been made.

Inv **Additional Information**

Asset Management Services, LLC. (FG Family Office Services), an SEC Registered Investment Adviser. Neither FG Asset Management nor FG Family Office Services provides tax or legal advice and is not a certified public accountant.



Schwab Accounts: You can also update your contact information through Schwab Alliance on your own. However, please still send clientsuccess@financialgravity.com an email to let us know that you have updated this so we can also update our internal systems.

If you have any questions, please reach out to us at clientsuccess@financialgravity.com or by calling 800-588-3893, opt. 2.

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