

CLIENT INFO UPDATE

At Evergreen, we take security very seriously. In order to protect you, we've outlined some types of personal information and the steps necessary to update that information.

Types of information to update

- Name
- Phone Number(s)
- Email
- Address (Permanent and/or Mailing)
- Beneficiaries
- Linked Bank Information
- Trust Details
- Business Account Updates

Steps for updating your information

- 1) If there's anything you'd like to securely upload, please click [here](#)
- 2) Please call or *Email us with the details you'd like to update
***if you Email, we will need to call you to confirm the details**