Update Memo Field Requests (add event termination date)	Yes	Original Letter with Client Signature.	IA - Required Termination Client Letter attach to the Case with Signature.
		Fax with Client Signature and Call Back.	Trust -Usually requested by either a trust officer where no back-up is necessary. Used most often to add termination event date.

Investment authority change request - No More approval is required from Lisa Combatti Team (Jennifer Barker, Lisa Combatti, Robert Deffense). Tag will check the Account type, Investment Authority, Voting Authority and Proxy Vote etc.

Investment Management Account agreement must be attached to the case and TAG will check the **Account types** i.e. Discretionary or Non-Discretionary as well as **Proxy Material for Discretionary field on the "IM account agreement"** which are as follows 1. Deutsche Bank should vote Proxies 2. Deutsche bank should not vote Proxies and should mail proxy material to you fields. Three types of changes fall under Investment Authority change request case type which are as follows :

1.Discretionary Accounts - DB Should vote proxies selected
Investment Authority : 1 Sole - Full Authority
Voting Authority : 3 DB Sole Authority

2.Discretionary Accounts - DB Should not vote proxies selected
Investment Authority : 1 Sole - Full Authority
Voting Authority : 2 Customer Votes

3.Non-Discretionary Accounts - Only DB Should not vote proxies will be selected
Investment Authority : 3 Advisory

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