UPDATE PERSONAL DETAILS TAB

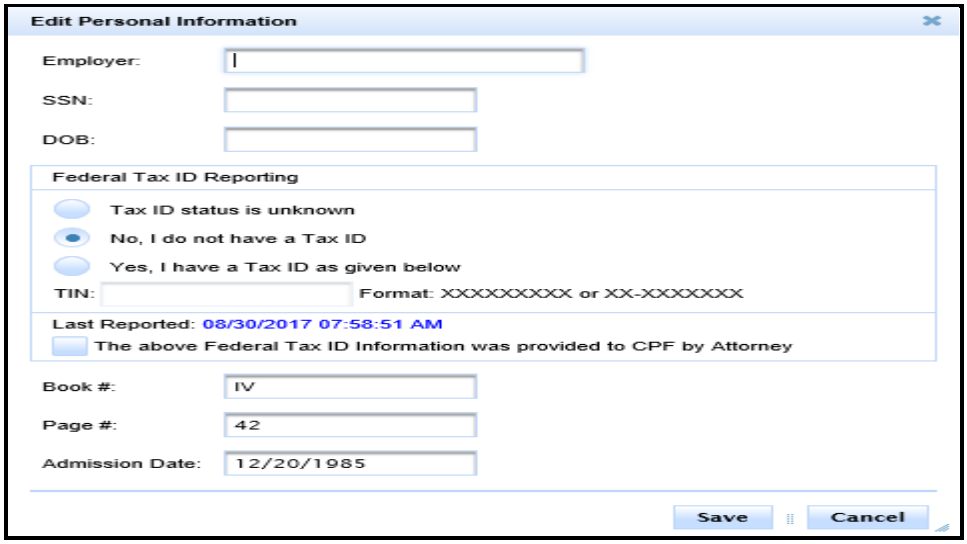
Compliance Item: TAX ID (TIN) Reporting

TIN Reporting can be completed a few different ways: 1. Updated under the Update Personal Details tab, 2. Completed as part of the online payment process or 3. Reported on the printed Invoice and mailed into the Client Protection Fun with the CPF Assessment Payment.

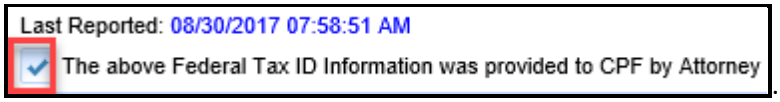
Compliance Item	Status	Detail
CPF	✔	Payments Current.
TIN	✘	Reporting Due. Click 'Update Personal Details' tab, then click 'Edit Personal Info' button to report.
Pro Bono	✘	Reporting Due. Click 'File Pro Bono Report' tab to file your report.
IOLTA	✘	Reporting Due. Click 'File IOLTA Report' tab to file your report.

1. Click **Update Personal Details** tab.

2. Select the **Edit - Personal Info** button.



3. Enter the information within the dialog box and be sure to place a check mark in the Last Reported Confirmation box or it will not register:



4. Click **Save**.
   a. Compliance for TIN Reporting is now Current on the Compliance Summary.

TIN	✔	Reporting Current.

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