

## PRECISEFP / WEALTHBOX MAPPING TABLE

**Important Information**  
 When searching for Wealthbox Contacts, make sure that your contact is set as the "Head of Household", is "Active", and has a valid email address set as "Primary".  
 Co-clients are identified by a "Spouse" or "Partner" Household Title.

Wealthbox Section	PreciseFP Section	Required	Comments
Persons	Client/co-client		<i>Integrates records where Household Title is Head, Spouse, or Partner</i>
Wealthbox Field	PreciseFP Field	Required	Comments
First Name	Client Details/Personal Details/First Name	Yes	
Middle Name	Client Details/Personal Details/Middle Initial		
Last Name	Client Details/Personal Details/Last Name	Yes	
Birthdate	Client Details/Personal Details/Birthdate		
Gender	Client Details/Personal Details/Gender		
Marital Status	Client Details/Personal Details/Marital Status		
Driver's License Number	Client Details/Driver's License/Number		
Driver's License Issued Date	Client Details/Driver's License/Issue Date		
Driver's License Expires Date	Client Details/Driver's License/Expire Date		
Driver's License State	Client Details/Driver's License/Jurisdiction		
Email (Primary)	Client Details/Contact Details/Email	Yes	
Phone (Mobile)	Client Details/Contact Details/Mobile Phone		
Phone (Home)	Client Details/Contact Details/Home Phone		
Phone (Work)	Client Details/Contact Details/Work Phone		
Address (Home)	Client Details/Contact Details/Address		
Job Title	Employment & Income/Employment/Job Position		
Company name	Employment & Income/Employment/Employer		
Important Information	Client Details/Other Information/Comments		

Wealthbox Section	PreciseFP Section	Required	Comments
Persons	Children		<i>Integrates Records where the Household Title is Child</i>
Wealthbox Field	PreciseFP Field	Required	Comments
Household Title	<i>Child</i>	Yes	
First Name	Family Members/Children/First Name	Yes	
Middle Name	Family Members/Children/Middle Initial	Yes	
Last Name	Family Members/Children/Last Name		
Birthdate	Family Members/Children/Birthdate		
Gender	Family Members/Children/Gender		
Email (Home)	Family Members/Children/Email		
PHone (Home)	Family Members/Children/Phone		
Address (Home)	Family Members/Children/Address		

Wealthbox Section	PreciseFP Section	Required	Comments
Persons	Other Family Members		<i>Integrates Records where the Household Title is not Head, Spouse, Partner, or Child</i>
Wealthbox Field	PreciseFP Field	Required	Comments
Household Title	Family Members/Other Family Members/Relationship	Yes	<i>When no relationship is set, records are exported as "Other dependent"</i>
First Name	Family Members/Other Family Members/First Name	Yes	
Middle Name	Family Members/Other Family Members/Middle Initial	Yes	
Last Name	Family Members/Other Family Members/Last Name		
Birthdate	Family Members/Other Family Members/Birthdate		
Gender	Family Members/Other Family Members/Gender		
Email (Home)	Family Members/Other Family Members/Email		
PHone (Home)	Family Members/Other Family Members/Phone		
Address (Home)	Family Members/Other Family Members/Address		