Office Space & Operations Checklist

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| **ONBOARDING PREPARATION** | **PERSON RESPONSIBLE** | **COMPLETED** |
| **Workspace Designated**  ❒ Workspace/Office  ❒ Office Furnishings  ❒ Office Supplies  ❒ Telephone & Number Set Up  ❒ PC & Printer Set Up |  |  |
| **Office Accessibility**  ❒ Key and/or Access Code to the Office  ❒ Parking Space Designated |  |  |
| **Technology Software Set Up**  ❒ Microsoft Windows & Office  ❒ Client Account & Portfolio Programs  ❒ Financial Planning Software  ❒ Contact Management (CRM)  ❒ Software (other) |  |  |
| **Email Set Up**    ❒ Set Up & Test New Email Address  ❒ Provide full Outlook Contact List  ❒ Add to Distribution Lists as Appropriate |  |  |