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 |  |  |