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**Account Set-up / Procedure Checklist**

|  |  |
| --- | --- |
| **Task** | **Date Completed** |
| **Initial Client Meeting** |  |
| Discuss MLW Vault with client – Provide client information/brochure  |  |
| Obtain Agreement/Enrollment form from client  |  |
| Obtain email address for account set-up |  |
|  |  |
| **Create Client Account**  |  |
| Go to [www.mylifeandwishes.com](http://www.mylifeandwishes.com) (Or your custom URL) |  |
| Click “TRY IT FOR FREE” (skip for custom URL’s) |  |
| Enter Client name, email address, enter your firm’s temporary password, enter your firms unique code, CAPTCHA, agree to Terms & Conditions |  |
| Enter your firms information under the ADVISORS tab |  |
| Upload client planning documents in DOCUMENTS & ACCOUNTS section  |  |
|  |  |
| **Provide your Client with login credentials via instruction sheet**  |  |
|  |  |
| **Notify MLW to communicate with your client** |  |
| Provide MLW client name and email address (this step allows MLW to trigger instructional email campaigns)  |  |
| Email client information to support@mylifeandwishes.com. CC: michelle@mylifeandwishes.com Excel format preferred |  |
|  |  |

The above checklist outlines a general process for implementing the My Life and Wishes Vault on behalf of your firms clients. We provide this as a Job Aide only and can be modified to adjust to your firms specific process.