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**Account Set-up / Procedure Checklist**

|  |  |
| --- | --- |
| **Task** | **Completed** |
| **Initial Process** |  |
| Discuss The Legacy Vault with client/prospect – Provide information/brochure…go for “yes” |  |
| Client/Customer pays you |  |
| Obtain email address for account set-up |  |
|  |  |
| **Create Client Account**  |  |
| Go to: Your Custom Create Account URL |  |
| Enter Client name, email address\*, enter your firm’s temporary password\*, CAPTCHA, below captcha select (Have Code) and enter your unique code, agree to Terms & Conditions, click create account |  |
| Enter your information under the ADVISORS tab |  |
| Upload client documents in DOCUMENTS & ACCOUNTS section *(if applicable)*  |  |
|  |  |
| **Email/Provide Client with login credentials via instruction sheet**  |  |
|  |  |
| **Mail welcome letter, referral card, credentials card, etc. to your new customer** |  |
|  |  |
| **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  |  |
|  |  |

*\*Double check email address and temporary password for accuracy!!!*

Need a refresher? Go to the Partner Portal for instructional videos:

<https://www.mylifeandwishes.com/notaryresourceportal/>

The above checklist outlines a general process for setting up the Legacy Vault for new customers. We provide this as a Job Aide/Guide only and can be modified to adjust to your specific process.