

**NECESSARY EQUIPMENT**

* Label maker
* Scanner
* Shredder
* Internet-connected computer w/large screen

**PRE-MEETING**

* Send out pre-meeting explanation of what to bring and what to expect
* Prepare empty storage/filing box for client
* Prepare empty file folders with typical file labels
* Set up client vault account
* Set up client PFM portal login

**IN THE MEETING**

* Sort through paper statements and existing files
	+ Place them into appropriate (new) file folders
* Shred unnecessary/outdated paper files
* Contact companies for any missing statements, policies, or other key documents
	+ Prepare empty file folders into which this information can be placed when it arrives
* Show client how to log into client vault account
* Scan most recent account statements and key client documents and place into client vault
* Show client how to log in to client PFM portal
	+ Use “private browsing/incognito” mode
	+ Begin connecting financial accounts