Trustworthy.

Your Getting Started Checklist

- [ ] Connect with the client. Your intro email could include:
    - [ ] A bit about yourself
    - [ ] Share the checklist (so they gather docs ahead of time)
    - [ ] Digitizing and organizing important documents for easy management
    - [ ] Set a time to meet (either in person or remotely)
- [ ] Fill out this short form so we can feature you on our marketplace
    - [ ] Our marketplace is a way for members to find your contact information and reach out for future work.
- [ ] Add the Trustworthy Certified Expert™ badge to your LinkedIn profile
- [ ] Refresh yourself on the Trustworthy platform
    - [ ] For example, familiarize yourself with creating categories for those instances where they have additional insurance, own a business, or need to include an element that is not already part of the platform.
- [ ] Refresh yourself on our security
- [ ] Check out our blog for additional resources and information
- [ ] Download the Trustworthy iPhone App for mobile (so you can follow along if they are using it to upload docs)
- [ ] Ensure your internet is working well for the remote sessions
- [ ] Have a list of priorities for the client to upload based on the checklist you've shared with them
    - [ ] Start simple with Family IDs (licenses, passports, birth certificates...)
- [ ] Upload documents to your inbox with Autopilot. There is no need to sort them at this time.

- [ ] They can use the Trustworthy extension and App or forward emails to the Inbox for easy upload.
- [ ] Documents categories include
  - [ ] Finance
  - [ ] Property
  - [ ] Passwords
  - [ ] Insurance
  - [ ] Taxes
  - [ ] Legal
  - [ ] Business
  - [ ] Family Resources
  - [ ] Contacts

- [ ] Add their [Emergency Access Collaborator]()
- [ ] Start sorting from the inbox

    Teach them how to do this so they can get more comfortable with the platform and continue the process between visits.

- [ ] Upload physical documents into your inbox with Autopilot; there is no need to sort them now.

    This process will require a scanner or smartphone (using a scanner app) to upload documents to the Inbox.

- [ ] Sort recently digitized documents from the Inbox
- [ ] Schedule any follow-up visits

    After your client feels comfortable with the platform, we suggest connecting at least once a quarter to maintain the relationship and see what additional needs your clients have.

- [ ] Submit any feedback or add your comments to [this document]()
- [ ] If you've been matched with a Trustworthy Concierge Member, please submit your invoices **in a pdf format** to: trustworthy@ap.ramp.com

- [ ] Create your affiliate link so you can share with your clients, friends, and family

Thank you and please feel free to reach out to Marie at marie@trustworthy.com with any additional questions.