# Evolv Black: Client Onboarding Checklist

1. **Workflow contact**

Please provide details of the main contact from your firm managing workflow.

|  |  |  |
| --- | --- | --- |
| **Full name** | **Email** | **Phone number** |
|  |  |  |

1. **Individuals requiring portal access**

Please provide a list of individuals from your firm requiring access to the Evolv Client Portal.

|  |  |  |
| --- | --- | --- |
| **First name** | **Last name** | **Email** |
|  |  |  |
|  |  |  |
|  |  |  |

1. **Previous auditor details**

Please provide details regarding your previous auditor so we can send an Ethical Clearance letter.

|  |  |  |  |
| --- | --- | --- | --- |
| **Previous auditor (firm)** | **Contract address** | **Main contact**  | **Main contact email** |
|  |  |  |  |

1. **SMSFs requiring auditing**

Please email a document listing each SMSF requiring auditing. Refer to the BGL 360 Auditor set up guide attached to this email for instructions on obtaining this information from BGL. Once you have received this document from BGL, please check it for completeness and add the main contact in your firm for each fund listed.

[ ]  Complete

1. **Invite Evolv as a user in BGL 360**

To allow us to continue/commence, you will need to invite Evolv as a user at BGL 360.  Please refer to the BGL 360 Auditor set up guide attached to this email for instructions.

[ ]  Complete

1. **Add the signing auditor as a contact in BGL 360**

After sending the user invitation, you will need to add the signing auditor as a contact. Please refer to the BGL 360 Auditor set up guide attached to this email for instructions.

[ ]  Complete

**Please complete the above and send to** **onboarding@evolvsuper.com.au****. We will set up Client Portal access once the information above has been provided.**