# 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** |
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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 Class Auditor set up guide attached to this email for instructions on obtaining this information from Class. Once you have received this document from Class, please check it for completeness and add the main contact in your firm for each fund listed.

Complete

1. **Class Business Code**

Please refer to the Class Auditor set up guide attached to this email for instructions on finding your Business Code.

|  |
| --- |
| **Business Code** |
|  |

1. **Add auditor to business contacts in Class to show in the tax return**

Please refer to the Class Auditor set up guide attached to this email for instructions.

Complete

1. **Grant Evolv auditor access in Class**

To allow us to continue/commence, we will need auditor access given by an access controller. Please refer to the Class Auditor set up guide attached to this email for instructions.

Complete

**Please complete the above and send to** [**onboarding@evolvsuper.com.au**](mailto:evolv@evolvsuper.com.au)**. We will set up Client Portal access once the information above has been provided.**