

Trustworthy.

For Trustworthy Certified Experts™ (TCEs)

- ☐ 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 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 Contact](#)

- ☐ 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 physical 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 recommendations to experts@trustworthy.com
- ☐ 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 Cairo at cairo@trustworthy.com with any additional questions.