



Schedule B Video Conference Checklist

DATE AND TIME OF MEETING: _____

MEDIUM FOR MEETING: _____

FILE NUMBER: _____

START OF MEETING

- ☐ Test video and sound quality.
- ☐ Have the client scan the entire room they are in to ensure no one else is in the room.

Any other parties present, and reason for presence:

- ☐ Have all parties introduce/identify themselves

Clients present: _____

Ask of clients:

- ☐ not to mute their audio at any time during the call.
- ☐ hold to camera ID that was previously provided and confirm that it is the client.

DOCUMENTS

- ☐ Confirm the client has received and printed the following documents:



- ☐ Review and explain each document
- ☐ Confirm client's understanding of the documents and provide sufficient opportunity for client to ask questions
- ☐ Have client angle camera, if required, when signing so signing of documents can be witnessed
- ☐ Have client hold documents to camera after signing to ensure signed correctly.

After all clients have signed any **affidavits** ask them (and obtain an affirmative response from all signatories):

- ☐ If sworn: "Do you swear that the contents of this affidavit as subscribed by you are true, so help you God?" or
- ☐ If affirmed: "Do you solemnly affirm and declare that the contents of this affidavit as subscribed by you are true?"
- ☐ After all clients have signed any **statutory declaration** ask them (and obtain an affirmative response from all signatories):

"Do you make this solemn declaration conscientiously believing it to be true, and knowing that it is of the same force and effect as if made under oath?"

- ☐ Provide the client with a unique phrase or code to write in a particular place on each document.

Unique phrase / code given to clients: _____

END OF MEETING

Confirm how client will be returning documents with wet ink signature.

- ☐ Scan
- ☐ Courier
- ☐ Mail
- ☐ Other: _____