



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.
- Take a screenshot of the front and back of each client's ID showing the face of the signator(s) of the documents alongside their photo identification and save the file.

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.
- 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.

- Courier
- Mail
- Other: _____

AFTER MEETING

- Complete Form PD3 prescribed by the Law Society of Saskatchewan.