

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.