



On-boarding Checklist

	Not Started	In Progress	Completed
Pre-hire			
I have secured office space and a telephone.			
I have purchased a computer, if necessary.			
I have purchased a printer, if necessary.			
I have ordered office supplies.			
I have worked with the home office to order codes and an e-mail address.			
I have informed my team of the new employee, if applicable.			
I have called and/or e-mailed the new employee to welcome him/her and provide details on his/her starting date.			
I have reviewed the job description and the Task Inventory Matrix and identified the tasks that will be delegated to the new employee.			
I have created a task chart and training plan based on the tasks identified in the Task Inventory Matrix. The training plan incorporates ways in which the new team member can self-study and/or acquire hands-on practice.			
A first day lunch meeting or welcoming has been arranged for the new employee.			



	Not Started	In Progress	Completed
On the first day			
The new employee has been greeted by the team.			
I have provided a tour and introduction to the firm.			
I have discussed key policies and procedures (i.e., absence policy, dress code policy, etc.).			
I have provided a list of key contacts, including names and telephone extensions of team members that the employee will interact with on a regular basis.			
General job expectations and the high level training plan have been discussed with the new employee.			
I have reviewed the Task Inventory Matrix with the new employee.			
I have held a debriefing session with the new employee at the end of the day to discuss his/her initial experience.			
During the first week			
I have scheduled a recurring weekly meeting with the new employee.			
I have verified that the employee is adjusting well to the new work environment.			
I have identified and addressed any issues or concerns the new employee has.			
I have daily huddles with the new employee, regarding his or her daily responsibilities.			
I regularly host communication meetings as needed throughout the day (i.e., daily huddles).			
I have verified that the new employee has scheduled recurring weekly learning/training time.			
During the first 30-60 days			
I have informed the employee of any training opportunities available			
I continue to maintain an "open-door" policy and encourage questions and feedback from the employee.			
I have reminded the employee to complete any forms that have not already been completed.			
I have provided positive feedback and/or constructive criticism to the employee.			



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