BEST OF ACCOUNTING

Preparing Your Contact List for the Survey

Included in this Getting Started Packet is a blank contact list (CSV file) along with instructions on how to properly fill out each column in order for it to upload smoothly into our system (PDF document titled "Contact List Template"). The PDF tells you which information belongs in each column and includes three examples. The CSV is the blank template you'll use to populate your contact list.

ACCESSING YOUR FEEDBACK

You will receive information regarding your MyInavero login. If you already have a login to MyInavero but forgot your password you can reset it by click the "I forgot my password!" button on the MyInavero login page.

ASSEMBLING YOUR SURVEY CONTACT LIST

Create a survey contact list with your clients' contact information and data segmentation (if applicable to your package), and upload to MyInavero.

To be eligible for the award, each participating firm must provide Inavero a list of fifty percent (50%) or a minimum of 500 individual client contacts who were billed for services during three (3) or more consecutive months.

Don't Forget!

April 2018 Survey

- [ ] **ON DEMAND WELCOME WEBINAR**

Our quick 20 minute welcome webinar will take you through the steps of how to compile your survey contact list, upload it to your MyInavero account as well as survey best practices.

CLICK HERE to watch the webinar

- [ ] **COMPILE YOUR CLIENT SURVEY CONTACT LIST AND UPLOAD TO MYINAVERO BY March 14, 2018**

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