**THIS IS A TEMPLATE ONLY**. Please adapt this form to meet your business needs. There may be some sections you want to remove and others you will need to update or add to include your business information.

**LICENSE, COPYRIGHT AND INTELLECTUAL PROPERTY NOTICE & TERMS OF USE**: License of this document is for the purchaser’s sole personal use only. It is unlawful to forward, transfer, distribute, reprint for public consumption or resell this document in any manner whatsoever and may not be included in any sale of a business. Unlawful use or distribution violates U.S. and International Copyright Law and the seller’s exclusive rights to sell and distribute this form. The full extent of all legal remedies will be pursued against violators. Seller reserves the right to pursue unauthorized users of this instrument. If you violate our intellectual property, you may be liable for: actual damages, loss of income, and profits you derive from its use, and where appropriate, the costs of collection and/or statutory damages up to $100,000 (USD). Any dispute arising out of unlicensed use of this instrument shall be governed by the laws of the State of Florida, without regard to its conflict of laws provisions. You hereby agree to personal jurisdiction in the courts of the State of Florida, and agree not to bring any action against Seller in any other jurisdiction. Nothing in this Agreement shall limit the rights of Seller to initiate an action against you in any other jurisdiction where such jurisdiction may be properly exercised. License does not grant right for use in any educational or training program. If such a license is desired, please contact **Jennie Lyon (“Seller”) at** **jennie@jennielyon.com**to discuss obtaining one.

***DISCLAIMER****: This is not a legal document. This basic sample agreement is presented for informational purposes only. This document does not constitute legal advice. This information may or may not reflect the most current legal developments. Readers should check applicable laws and common practices in their state or locality and consult proper legal counsel with regard to business matters. Remove from document once read and understood.*

*Replace all of the information in the document that is bolded, highlighted + italicized in this Client Welcome Kit with your business information. Also, remember to update the footer. Then delete this information, add your business header below and save it as a PDF before sending to your client to sign with a digital signature system.*

YOUR HEADER HERE

Welcome to

[YOUR BUSINESS NAME]

Welcome

I would like to welcome you to **YOUR BUSINESS NAME**! I am excited to work together. It is my personal commitment to provide the best possible service to you as your virtual assistant. This Welcome Kit is a simplified way to welcome you into my client family.

In this welcome kit, you will find:

* Explanation of How I Work
* Client Questionnaire
* Contact Information

Please note that the contract portion of this packet as well as the client questionnaire will need to be filled out by you and returned to me via email.

I look forward to working together.

Warmly,

(YOUR NAME)
(YOUR BUSINESS INFORMATION)

What you can expect?

**What you can expect by working with *YOUR BUSINESS NAME***

All calls and e-mails will be returned within 24 hours during business days (Monday – Friday).

**Hours of Operations**

My business hours are Monday-Friday ***ADD YOUR HOURS HERE***

**Rush Jobs**

Sometimes you will need me in a rush. For rush jobs, you will be charged a 25% surcharge for less than 24 hours’ notice and 50% surcharge for evenings, weekends or U.S. holidays.

**Holidays**

***YOUR BUSINESS NAME*** will take off all ***YOUR COUNTRY*** public national holidays.

***INCLUDE ANY OTHER DATES THAT YOU ALWAYS TAKE OFF EACH YEAR – FOR EXAMPLE A WEEKLY SUMMER VACATION***

**Referrals**

We love referrals! Thank you for referring us to your friends!

**Confidentiality**

I adhere to a strict confidentiality code and none of your personal information will be shared with a third party. All documentation sent to me will be returned upon completion and payment. I take your confidentiality very seriously all of your passwords are encrypted and I use the highest level of internet security. If I need to use your credit card, I will shred the info after 1 use. Your privacy is very important to me!

Client Questionnaire

I really want to understand how I can better assist you and your business – please complete the following questionnaire and return it to me via email as soon as possible.

(ADD ANY QUESTIONS YOU WOULD LIKE TO GATHER FROM YOUR CLIENTS)

1. What is the full name of your company?
2. What is the best way to communicate with you? Phone? Email?
3. What hours do you work?
4. What hours are you looking for your virtual assistant to work?
5. If you have any of the following materials in place, please forward them electronically:
* Current photographs and website banner \_\_\_\_
* Current logins and passwords for the sites I will manage for you \_\_\_\_
* Company event calendar \_\_\_\_
* All websites that you will want me to manage \_\_\_\_

***YOU CAN ALSO ENTER IN ANY QUESTIONS THAT APPLY TO THE TYPE OF VIRTUAL ASSISTANT WORK YOU WILL BE COMPLETING FOR THE CUSTOMER***

Contact

***[YOUR NAME]***

***[YOUR TELEPHONE NUMBER]***

***[YOUR EMAIL ADDRESS]***