Checklist First Steps

Please send this checklist to Kolja Guzy
kolja.guzy@ecovis.com, Phone: +49 30 31 00 08 554

This checklist is designed to provide us with the first information of your office to be posted under Ecovis in the internet and in our intranet. And to provide us with the contact person who acts as an Ecovis co-ordinator, a contact person for the intranet access, a contact person for marketing issues, a contact person for incoming invoices from ECOVIS International and the decision on your logo to prepare your individual corporate design templates.

Ecovis Coordinator

Please name an Ecovis coordinator who functions as global contact and coordinates all professional/ administrative activities and is in charge of updating the local intranet and internet.

Given name, family name, email:

Marketing and Accounting Contact

Please name a person in your office, who functions as the global contact for marketing issues and a person in your office, who functions as the global contact for incoming invoices of ECOVIS International:

Marketing contact (will be added to the Marketing e-group marketing-contacts@ecovis.com):
Given name, family name, email:

Accounting contact for incoming invoices:
Given name, family name, email:

Ecovis logo

Ecovis corporate design policy allows the current name of your office to be combined with the Ecovis logo. In the corporate design manual this is termed the "sub-line" or "division". Normally, this is shorter than the name recorded in the trade registry.

Our proposal:

Checklist First Steps

Office information for the Ecovis intranet		OK
Address Company name Telephone Telefax Website		☐
How to get there (e.g. link google maps)		☐
Office hours Days Hours UTC +/- hours UTC +/- hours (your local summertime)	 - -	☐

Checklist First Steps

Independence Check Tool

ECOVIS International has introduced the IT-based Independence Check Tool AURE.IND to manage the independence queries. The tool's functions are described in the A 2.3 User_manual.docx.

Each Ecovis office is obliged to examine the independence of Ecovis international network partners outside its home country when accepting new audit engagements (see A 2.3 User_manual.docx).

The international partners can choose to use the AURE.IND tool either by uploading information on their existing clients for the automatic independence check or can login and answer manually to each independence query. Initial client list to be uploaded is included in specific sheet of A2.1AURE:IND_import_file and will be automatically uploaded in the tool by the service provider. After initial upload, the partners need to regularly update the information on those clients every 90 days. Please report once per year to Kolja Guzy (kolja.guzy@ecovis.com) (deadline 31st March of each year) that your data input is up to date.

I. Please name your Independence Check Tool Co-ordinator here:

Given name and family name, email:

The Independence Check Tool coordinator will also be automatically integrated in the "intindependence" e-Group. The "intindependence" e-Group should be used, if a direct independence query to the Ecovis partners will be necessary next to the Independence Check Tool, in order to assure the financial and personal independence before servicing a client.

II. Please fill in the A 2.1AURE:IND_import_file (office details and user accounts) and mail a soft copy of this Excel Sheet to Kolja Guzy (kolja.guzy@ecovis.com).

We will forward your data to the service provider for uploading on AURE.IND tool.
Please do not change the structure of the file (by deleting or adding lines or columns) and fill in all sheets for each category. Please be informed there can be only one branch partner (who is automatically a user as well) and multiple users within your firm.

III. Once your data is incorporated in the database, your user account, defined as branch partner account, will receive a welcome email with the login details and password for AURE.IND.

IV. As soon as you received your login details from Ecovis Independence, you are requested to upload your clients by yourself and regularly keep your data up to date (in case your choice was to provide client data for automatic independence check) or to answer to every independence request according to email automatic notifications. Please be inform that every Ecovis firm is required to use AURE.IND for independence check or responses, even if services provided are other than audit & assurance services.

V. For each new audit engagement, even if is for a recurrent client of your firm, please use AURE.IND to check your independence within Ecovis group.

Login: https://www.ecovis-independence.com

The following Information is attached to this Checklist with regard to the Independence Check Tool:
- A 2.1 AURE:IND_import_file_ECOVIS_nameExcel Sheet
- A 2.2 Check_procedure.docx
- A 2.3 User_manual.docx
- A 2.4 Creation_of_Engagement.docx

User manuals and video tutorials are also available at: http://kb.ecovis-independence.com

Help Desk is available at: http://support.attn.cz and will be supported also via email address help@auresw.cz**.**

E-groups

By marking the e-groups on page 5 you have the opportunity to sign up for the special e-groups for internal communications (audit, accounting, tax and law professional and on general partner level).

However, if you would like to reach our partners please mail to:
intpartners@ecovis.com to reach all international partners. At least one partner of your firm should be included into this e-group.
inttax@ecovis.com to reach all international tax professionals
intaccounting@ecovis.com to reach all international accounting professionals
intaudit@ecovis.com to reach all international audit professionals
intlaw@ecovis.com to reach all international law professionals
intmna@ecovis.com to reach all partners involved in mergers and acquisition activities

Regional e-groups (only available for members from the specific region)

intasia@ecovis.com to reach all Asia Pacific partners
inteurope@ecovis.com to reach all European, Middle Eastern and African partners
intamericas@ecovis.com to reach the partners of the Americas

Ecovis email addresses

Please enter in the list below the employees (given name, family name) and their current email addresses to include them into the according e-groups.

With regards to email addresses with Ecovis domain, please kindly contact Felix Greb (felix.greb@ecovis.com) in order to start according steps to have Ecovis email accounts created. The Ecovis standard is to use the Top Level Domain within your country, which is ecovis.XXX.
Also please list your current office email addresses or name the persons, where the general email addresses city@ecovis.com should be allocated, which in your case will be XXX@ecovis.com.

"Who is who"

Please mark the persons in the list below, who should be added in our "who is who" database. In this database, beside the partners, all employees should be included who might be of interest for other Ecovis offices with their skills and functions. This database contains information like occupation/ title, industry knowledge, special fields of interest and spoken languages. In this first step we will just add the marked person with contact information. After confirmation you have to add your personal information self-contained. With the confirmation you will receive further details.

Ecovis email addresses, “who is who” and e-groups

Gender (f/m)	given name and family name (in full) and general office e-mail address (i.e. city@ecovis.com)	previous e-mail address	“Who is Who”	e-groups (profession)					e-groups (location)[2]			
				inttax	**intaccounting**	**intaudit**	**intlaw**	**intmna**	**Intpartners**[1] (for all partners)	**inteurope** (for EMEA)	**intasia** (for Asia-Pacific)	**intamericas** (for North and Latin America)
			X	☐	☐	☐	☐	☐	☐	☐	☐	☐
			X	☐	☐	☐	☐	☐	☐	☐	☐	☐
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[1]Please include at least one partner into the Intpartners e-group, [2] e-groups (location) are only available for members from this specific region