New bookkeeping client onboarding checklist

STEP 1. Send proposal and engagement letter

- An overview of your firm and the benefits of working with you
- Information about your services and prices
- Formal terms and conditions
- Information on how to pay

Once the client has agreed to your proposal and formalized the relationship by e-signing the documents and providing payment details, you can move on to step 2.

STEP 2. Send a welcome email

- Warm, personalized welcome
- Outline the next steps and what to expect
- Invitation to your software and client portal

Once the client is set up on the client portal, you can move on to step 3.

STEP 3: Gather information and documentation

- **Client information:**
    - Business name
    - Address
    - Employer identification number (EIN)
    - Contact details
    - Industry

- **Financial records:**
    - Bank statements

    - Credit card statements
    - Previous financial statements
    - Accounts receivable and payable reports

- **Tax information:**
    - Previous tax returns
    - Sales tax information
    - Payroll tax information

- **Legal and regulatory documents**
    - Business registration documents,
    - Operating agreements or partnership agreements
    - Licenses and permits

- **Information about the client's software:**
    - Login credentials for accounting platforms
    - A list of all accounts used in the accounting system

- **Payroll and HR documents:**
    - Employee information
    - Payroll reports
    - Information about benefits and bonuses

- **Vendor and customer information:**
    - List of vendors, including contracts and payment terms
    - List of customers, including contracts, and payment terms

- **Insurance policies:**
    - Liability insurance
    - Property and equipment insurance
    - Worker's compensation insurance

STEP 4: Review documents and add the client to your systems

- Review all information and documents
- Chase client for missing information if necessary
- Add client info to your CRM, bookkeeping software, and other systems

STEP 5: Request feedback from the client

- Send feedback form or message
- Review process and implement changes where necessary

Did you know?
🔹 Firms see **2x faster payments** using TaxDome’s automated billing 🔹 **86% of firms** on TaxDome are **happy with their client portal** 🔹 TaxDome's workflow automation **saves firms up to 40 hours per employee per month**
Start seeing these results within the first month — request a free demo!