



NEW CLIENT ONBOARDING CHECKLIST

TECHNOLOGY ACCESS

- ☐ INTUIT QUICKBOOKS ONLINE --> PROVIDE ACCOUNTANT ACCESS.
- ☐ ACCOUNT ACCESS (VIEW ONLY) FOR ALL BUSINESS BANK ACCOUNTS AND CREDIT CARD ACCOUNTS.
- ☐ ACCOUNT ACCESS TO ANY ADDITIONAL OUTSIDE DATA SOURCES. (OTHER SOFTWARE PROVIDERS FOR REVENUE & EXPENSES FEEDS DIRECTLY TO INTUIT QUICKBOOKS)

BUSINESS ORGANIZATION DOCUMENTS

- ☐ COPY OF FEIN CONFIRMATION.
- ☐ COPY OF LLC AGREEMENT.
- ☐ COPY OF CURRENT BUSINESS LICENCE(S).
- ☐ COPY OF ALL CURRENT INSURANCE POLICIES. (AUTO, GENERAL LIABILITY, WORKERS COMPENSATION, UMBRELLA, ETC.)
- ☐ COPY OF ALL CURRENT RENTAL/LEASE AGREEMENTS, IF APPLICABLE.

SCHEDULE OF WORK

- ☐ EXECTUED SCHEDULE OF WORK FOR ACCOUNTING/BOOKKEEPING SERVICES.

PRITCHETT ACCOUNTING & CONSULTING

