

Client Onboarding Checklist

Dear [Client's Name],

We are excited to welcome you to [Company Name]! To ensure a smooth onboarding process, we have prepared a checklist for you.

Onboarding Checklist

- Complete the Client Information Form
- Review and sign the Service Agreement
- Schedule a kickoff meeting
- Provide necessary documentation (e.g., ID, legal agreements)
- Set up payment details
- Access our client portal

Please let us know if you have any questions or need further assistance. We look forward to working with you!

Best regards,
[Your Name]
[Your Position]
[Company Name]
[Contact Information]