

# Client Onboarding Checklist

Dear [Client's Name],

Welcome aboard! We are excited to have you as a new client. To ensure a smooth onboarding process, please find below a checklist of items we need from you:

## Client Onboarding Checklist

- Complete the Client Information Form
- Submit necessary identification documents
- Review and sign the Service Agreement
- Provide any special instructions or preferences
- Schedule an onboarding meeting

Please let us know if you have any questions or require assistance in completing these items.

Thank you, and we look forward to a successful partnership!

Sincerely,

[Your Name]

[Your Position]

[Your Company]

[Your Contact Information]