

# Client Admission and Onboarding Checklist

Date: **[Insert Date]**

Client Name: **[Insert Client Name]**

Email: **[Insert Email Address]**

Phone Number: **[Insert Phone Number]**

## Welcome to **[Company Name]**!

We are excited to have you on board! Please find below the checklist for your admission and onboarding process.

### Onboarding Checklist:

- Complete and sign the Client Agreement
- Provide necessary identification documents
- Fill out the Client Information Form
- Schedule the Introductory Meeting
- Review onboarding materials
- Set up your account on our platform
- Provide payment information
- Discuss goals and expectations with your project manager

### Next Steps:

Please complete the items above and return any required documents by **[Insert Deadline]**. If you have any questions, feel free to reach out to us.

Thank you for choosing **[Company Name]**! We look forward to working with you.

Best regards,

**[Your Name]**

**[Your Position]**

**[Company Name]**

**[Contact Information]**