

New Client Checklist

Client Name:

Date:

Task



Completed

Physical File Folder

Done

Computer File Folder

Done

Contract/Agreement

Done

Client Data: beginning records into
Accounting program

Done

Timekeeping Log

Done

Correspondence/Postage/Supplies Log

Done

Designated CD/DVD for backups

Done

Email folder w/rule to filter email into folder

Done

Thank you card/letter sent

Done