

SAMPLE NEW CLIENT ONBOARDING PROCESS

ACTION/LIST	John Smith	Cheryl Jones	NEXT CLIENT NAME	ANOTHER CLIENT NAME
THANK YOU REFERRER	Done	Done		
CREATE ELECTRONIC FILE FOLDER	Done	Done		
APPOINTMENT CODING	Done	Done		
ABC SERVICE LEVEL CODING	Done	Done		
B-DAY CARD LIST	Done	Done		
CALENDAR LIST	Done	Done		
HOLIDAY INVITE LIST	Done	Done		
PLAN LIST	N/A	Done		
CHILDREN/GRAND CHILDREN DATA	N/A	Next Mtg		
ACCOUNT AGGREGATION	Done	N/A		
SOCIAL MEDIA	Done	N/A		
NEWSLETTER	Done	Done		
ACCOUNTANT	Done	Next Mtg		
ATTORNEY	Done	Next Mtg		