Filing Buddy

GLOBAL SERVICES · ONBOARDING

Onboarding Checklist

Accounting, bookkeeping and tax compliance support for businesses in the USA, UK, Europe, Australia and New Zealand.

Have these ready and your first month starts without delays. Tick each item as you go.

- [ ] 1 Signed engagement letter and NDA
- [ ] 2 Software access and permissions
- [ ] 3 Chart of accounts and previous reports
- [ ] 4 Bank, card and gateway access
- [ ] 5 Payroll and tax registration details
- [ ] 6 Compliance calendar and priority list
- [ ] 7 Kick-off call and first-month plan

Data security: secure password vaults and no sharing of credentials by email.

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