FirmForms

The Solo Firm Client-Onboarding Checklist

Seven steps from first inquiry to a signed, paid engagement.

---

1. **Qualify the inquiry**
   Confirm the service, scope, and fit before you invest time. A quick screen saves hours later.

2. **Scope and price in writing**
   State the services, the fee, and what is out of scope. No verbal-only agreements.

3. **Send the engagement letter first**
   Your engagement letter is a liability shield. Send it before any work begins, every time.

4. **Capture a real e-signature**
   Get a signed copy with a timestamped audit trail. Signatures are valid under ESIGN and UETA.

5. **Collect intake and documents**
   Gather prior-year data, IDs, and source documents in one place so nothing is chased twice.

6. **Invoice or take a deposit at signature**
   Bill at the moment of signing, not after the work. This is where cash flow is won or lost.

7. **Confirm the kickoff in writing**
   Restate deadlines, access, and the next step. A clear start prevents scope creep.
