Your onboarding checklist

Tick each step as you go. The same 6 steps, with videos and buttons, are on your welcome page.

1 **Read our Terms and Conditions**

Month to month, no long-term contract. Full terms are on our website (Terms and Conditions, in the footer).

2 **Fill out the onboarding questionnaire**

About 10 minutes, on your welcome page (step 2). It never asks for SSNs, tax ID numbers or account numbers.

3 **Register for the Secure Firm Portal and upload your documents**

Register: securefirmportal.com/Account/Register/21617. Then upload:

- [ ] PDF statements for every business checking, savings, credit card and loan account (this year, plus any months we need to catch up)
- [ ] Your most recent business tax return (or your personal return if you file a Schedule C)
- [ ] Legal papers: LLC or corporation registration, partnership agreement, and your IRS EIN letter
- [ ] A list of business income and expenses that did not go through your business accounts

4 **Set up QuickBooks Online**

- [ ] Get a QuickBooks Online subscription at our discount, or keep the one you have
- [ ] Optional: set up Intuit payments to take card payments in QuickBooks
- [ ] Invite our team as your accountant in QuickBooks Online

5 **Book your onboarding call**

A 30-minute video call. Book it 5 to 7 business days out so your documents are uploaded first.

6 **Ask about add-on services if you need them**

AR, AP, Class Tracking, Cash Flow Analysis, business tax returns, strategy sessions and catch-up work. Prices are on your welcome page (step 6).

Keep your information safe. We will never ask for your bank usernames, passwords or security questions, and never for Social Security or account numbers by email, text or form. Statements and documents go only through the Secure Firm Portal.