Title
Kick-off (Step 1: Project)
Kick-off of your audited financial statements
Kick-off (Step 2: Client)
Initial audit documents requested
Kick-off (Step 3: Internal)
Planning (Step 1: Internal preparation)
Audit Planning Meeting
Planning (Step 2: Client preparation)
Critical details needed to complete your audit
Additional details needed to complete your audit
Planning (Step 3: Preliminary review)
Fieldwork (Step 1: Prep for Testing)
Additional information requested for your audit
Fieldwork (Step 2: Testing at our office)
On-site testing (for audit)
Fieldwork (Step 1: Testing at Client)
Pre-issuance Review
Audit review meeting
Finalization (Step 1a: Client meeting)
Finalization (Step 1b: Deliver electronically)
Audit documents ready for review
Finalization (Step 2: Issue Financials)
Admin
Client
Accountant
Reviewer