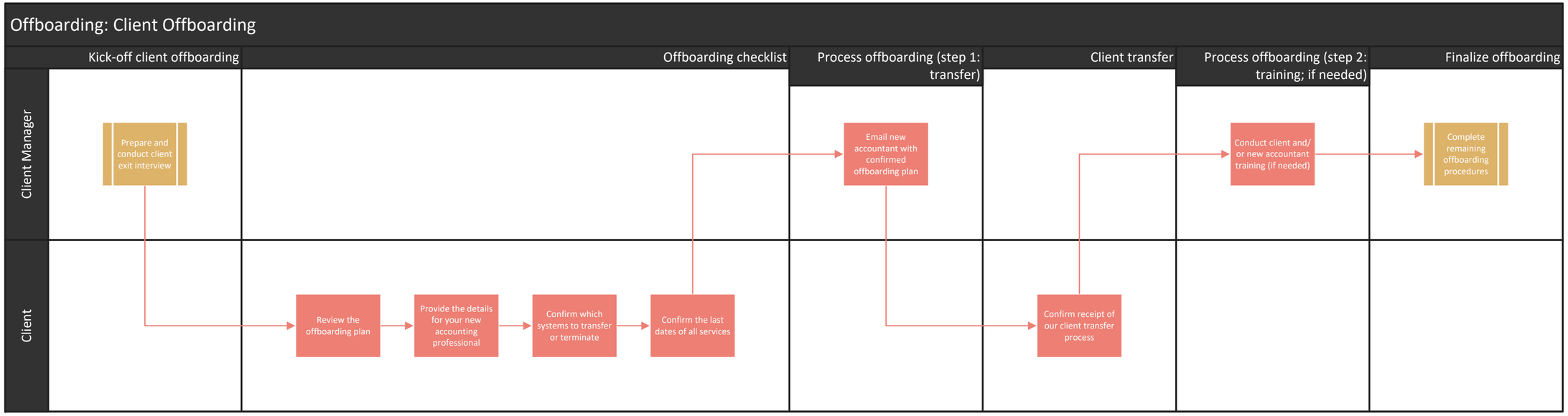
Offboarding: Client Offboarding
Kick-off client offboarding
Offboarding checklist
Process offboarding (step 1: transfer)
Client transfer
Process offboarding (step 2: training; if needed)
Finalize offboarding
Client Manager
Client
Prepare and conduct client exit interview
Review the offboarding plan
Provide the details for your new accounting professional
Confirm which systems to transfer or terminate
Confirm the last dates of all services
Email new accountant with confirmed offboarding plan
Confirm receipt of our client transfer process
Conduct client and/ or new accountant training (if needed)
Complete remaining offboarding procedures