

Onboarding Steps

What to Expect



1 DISCOVERY CALL

We'll start by having a 30 minute 1:1 where we can chat about your business goals and how we can achieve them together. We'll discuss what level of accounting is right for you, timelines and the ways we will communicate with you.



2 PROPOSAL AND ENGAGEMENT

Next, we'll send you a proposal document and letter of engagement to review and sign. These are the legal documents to begin our working relationship,



3 ONBOARDING

This is the most laborious part of working together so thankfully we only do it once! The next page elaborates on the finer details to this element.



4 WORK COMMENCES

You send us your records and we'll complete your Bookkeeping/Accountancy requirements as agreed.

We set business goals based on what you dream to achieve.

We want to help you build your business so that it works for you, not the other way around!

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This process has multiple elements, and once all completed, we'll be on our way to financial success.



ANTI-MONEY LAUNDERING (AML)

We complete the AML obligations as required by law. In addition to either meeting in person or a video call, you will need to provide us with:

- a picture of your passport/driving licence
- a copy of a recent* utility bill and
- a copy of a recent* bank statement



PROFESSIONAL CLEARANCE

This is done by us sending a letter to your previous bookkeeper/accountant and them releasing your information and records to us once you have granted them permission. If you haven't already got a bookkeeper/accountant, we can skip this step.



BUSINESS DETAILS

We'll send you a form to complete which will detail all the information we need to know about your business.



HMRC

We'll send a request to HMRC to allow them to communicate with us on your behalf.

*recent is defined as within the last 3 months