

Onboarding a new client

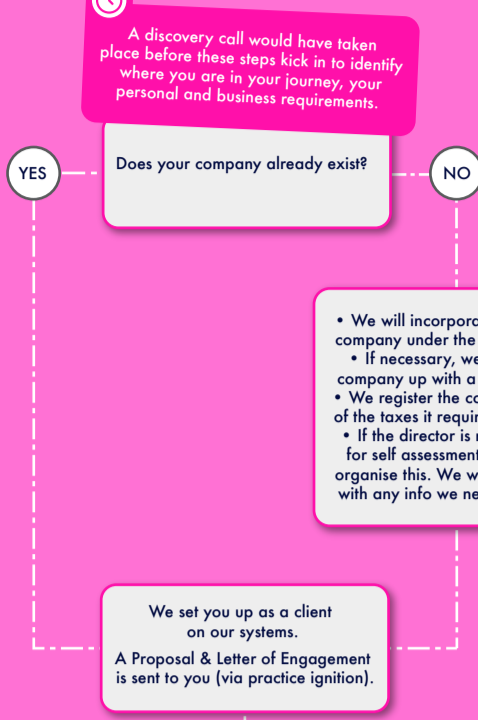
Hello! We thought it might be useful to share the Onboarding Process with you so you know the steps we follow when you first join us as an awesome client.

These are the tasks that we are busy getting on with (often in the background):

These are the tasks that we need you to do for us please:



NEW CLIENT SET UP



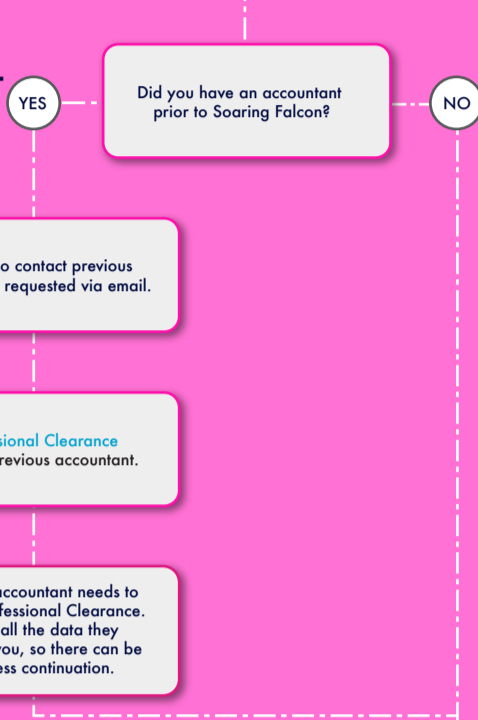
A discovery call would have taken place before these steps kick in to identify where you are in your journey, your personal and business requirements.

- We will incorporate the Limited company under the chosen name.
- If necessary, we will set the company up with a 'virtual office'
- We register the company for all of the taxes it requires with HMRC
- If the director is not registered for self assessment, we will also organise this. We will be in touch with any info we need from you.

You will need to provide us with information regarding directors, secretaries, shareholders, etc. of the new company.



PREVIOUS ACCOUNTANT

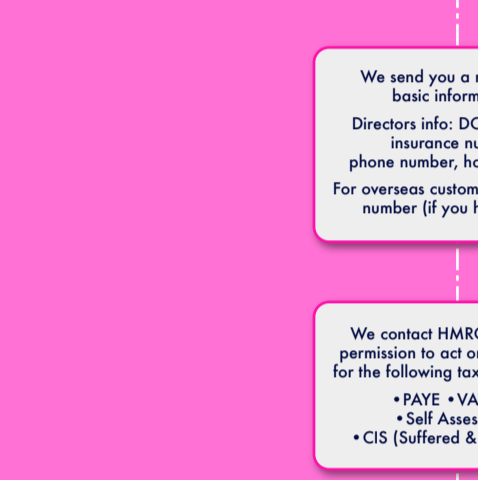


This can sometimes take time as it is dependent on your previous accountant returning the information to us.

Sign Proposal, Letter of Engagement and add your bank details for the DD. Agree quote & direct debit agreement.



HMRC



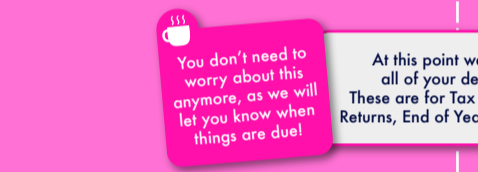
Send over basic information to Soaring Falcon.

HMRC will send you information containing a code that Soaring Falcon need to complete this process.
These have EXPIRATION DATES so please send a photo of them to hello@soaring-falcon.co.uk ASAP.

This can sometimes take time as HMRC have to post these and will not supply them in any other format.



DEADLINES ARE SET



You don't need to worry about this anymore, as we will let you know when things are due!



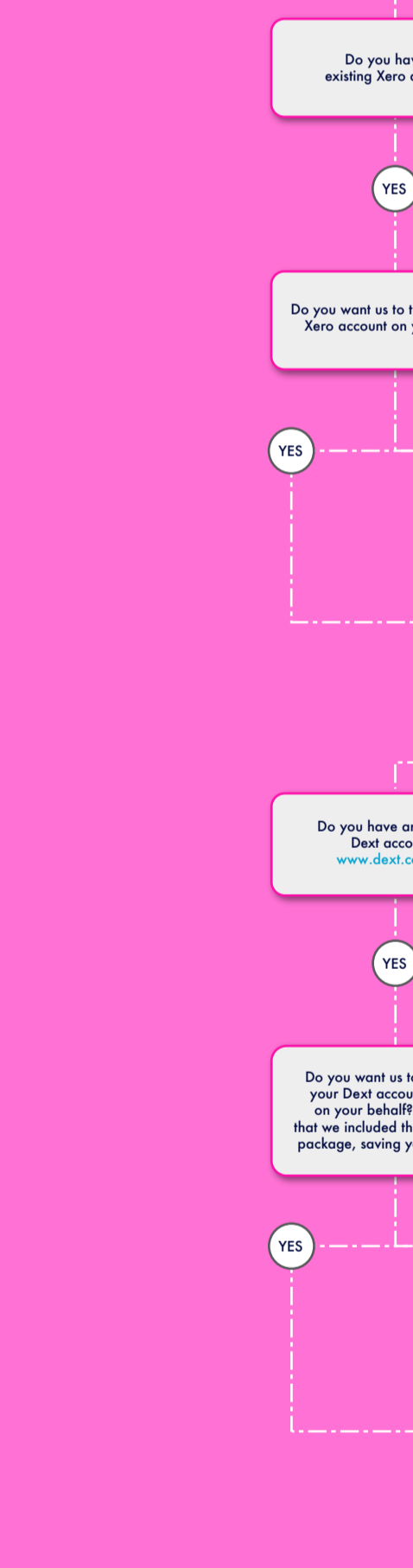
MONEY LAUNDERING CHECK



If we need any extra information we will ask you at this point.



XERO & DEXT



You will receive a set-up invitation email (please check your junk folder).
You will need to complete your set-up process by choosing a password. At this point you need to install the app on your phone. Training will also be provided to help you set up.

You will need to grant advisor & user access to the Soaring Falcon team
<https://central.xero.com/s/article/Add-a-new-user-to-your-organisation?userregion=true>

You will need to transfer the organisation's subscriber role over to Soaring Falcon
<https://central.xero.com/s/article/transfer-resend-or-cancel-the-subscription-for-your-organisation>

You will receive an email invitation to Dext.
At this point you need to install the app on your phone. Training will be provided

You will need to add Soaring Falcon as an accountant to your Dext account

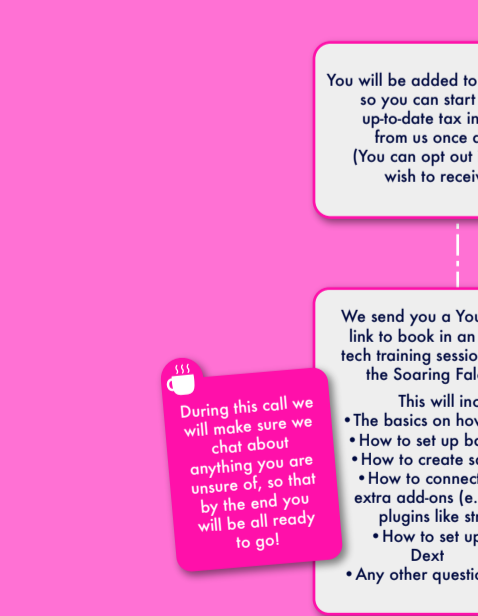
You will need to transfer ownership over to Soaring Falcon

We ensure that your Receipt Bank and Xero accounts have been set up correctly (which includes setting up payroll in Xero).

This is set up at the start and can take time. However, this will be seamless after set up.



COMMS



During this call we will make sure we chat about anything you are unsure of, so that by the end you will be all ready to go!

You will need to choose a slot for your onboarding tech training session.
It will last approximately an hour.
There may be other tech we can add to help you make your business efficient, but one step at a time.

We always expect there to be questions and queries from you, as we both learn how each other work. Please feel free to call, email or book in a video call with us at <https://soaring-falcon.youcanbook.me>

The process may seem intensive at the start, we want to ensure we get things right for you from the get-go. We very much look forward to working with you and helping you in your business journey.