

FREE RESOURCE

New Client Onboarding Workflow Template

A phase-by-phase template with owners and due dates — from signed agreement to first review.

How to use this template

Copy this table into your CRM or project tool. Assign every task an owner and a due date the day the client says yes. Nothing moves forward without all three: task, owner, date.

New client onboarding — template

Phase / Task	Owner	Due
AGREEMENTS		
Engagement agreement sent	Advisor	Day 1
Signed agreement received & filed	Staff	Day 3
ACCOUNTS		
Account applications prepared	Staff	Day 3
Applications signed & submitted	Advisor	Day 7
Transfers initiated; confirmation logged	Staff	Day 10
WELCOME		
Welcome packet / email sent	Staff	Day 7
Client portal access set up	Staff	Day 10
First review meeting scheduled	Advisor	Day 14
FIRST REVIEW		
Prep completed 48h before meeting	Advisor	Day 28
Meeting held; notes & next steps logged	Advisor	Day 30

Completion rule

Onboarding is not "done" when paperwork is signed. It is done when the first review meeting is held and its notes and next steps are logged. Until then, the client is still onboarding.

Want this built into your practice?

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