

Client Offboarding & Handover Checklist

Work through this list at the end of every project, before you close the file.

1. Final files

- ☐ All final files delivered in agreed formats
- ☐ Source / editable files delivered if agreed
- ☐ File names clear and organised
- ☐ Delivery link or email confirmed received

2. Access & accounts

- ☐ Passwords and logins handed over securely
- ☐ Your access removed where agreed
- ☐ Client confirmed they can log in
- ☐ Third-party accounts transferred

3. Money

- ☐ Final invoice sent
- ☐ Final payment received
- ☐ Expenses and extras accounted for
- ☐ Receipt / confirmation sent

4. Knowledge handover

- ☐ How-to notes written for the client
- ☐ Walkthrough call or video offered
- ☐ Known issues or limits explained in writing

5. Close-out

- ☐ Project closure report sent
- ☐ Testimonial requested
- ☐ Referral requested
- ☐ Future work / maintenance offered
- ☐ Files archived and project file closed

Sign-off

Client	[Name]
Date	[Date]
Freelancer	[Name]