

Ask clearly. Get the right documents back.

Client document request checklist

Client

Purpose / period

Return location

Your contact

Before you send the request

- ☐ Ask only for documents needed for this work.
- ☐ Name each document clearly. Specify the period, pages and accepted format.
- ☐ Flag anything the client must request from someone else. Start it first.
- ☐ State a requested date, who can access the files and what happens next.

Your request list

Document and period	What counts as complete?	Needed by
1.		
2.		
3.		
4.		
5.		

A clear message to the client

“Please send these documents to the return location above. If something is unavailable, tell us which item. We will review the files and let you know if anything needs correcting.”

If photos are suitable, ask for good light, legible text, every page and all edges visible. Follow any requirement for an original or another format.

Adapt this manual template to the engagement. It is not an official or compliance list. Explain the applicable retention; a portal is not a permanent archive.

One private client portal. Documents sent and received.

droplana.com · Editable examples: droplana.com/blog/client-onboarding-document-checklist