

REQUIRED DOCUMENT CHECKLIST

CLIENT-005

Provide only records that are relevant and authorized for the proposed engagement. Arcleron may request additional items after reviewing the scope.

Do not submit

Passwords, recovery codes, full payment-card numbers, private encryption keys, unnecessary Social Security numbers, or regulated data through ordinary email or unapproved file-sharing methods.

BUSINESS AND AUTHORITY RECORDS

Available items

- | | |
|---|--|
| ☐ Entity / DBA information | ☐ Authorized contact list |
| ☐ Organization chart | ☐ Current business plan or objectives |
| ☐ Relevant licenses / permits | ☐ Insurance requirements |
| ☐ Prior assessments or reports | ☐ Other authority records |

PROJECT AND OPERATING RECORDS

Available items

- | | |
|---|---|
| ☐ Process maps / SOPs | ☐ Policies / work instructions |
| ☐ Contracts / statements of work | ☐ Rate cards / pricing schedules |
| ☐ Time tickets / work orders | ☐ Repair orders / service records |
| ☐ Invoices / billing samples | ☐ Quality / error / rework records |
| ☐ Schedules / staffing data | ☐ Inventory / purchasing records |
| ☐ Supplier / vendor information | ☐ System reports / screenshots |

FINANCIAL AND PERFORMANCE RECORDS

Available items

- | | |
|--|--|
| ☐ Budget or approved cost range | ☐ Cost summaries |
| ☐ Revenue / billing reports | ☐ Productivity or capacity data |
| ☐ KPI / scorecard reports | ☐ Freight / shipping costs |
| ☐ Warranty / return data | ☐ Customer complaint data |

REQUIRED DOCUMENT CHECKLIST - CONTINUED

CLIENT-005

List the records you expect to provide and the date range covered

Identify any records that require special handling, redaction, approval, or a secure transfer method

Records not available and why

CERTIFICATION AND SIGNATURE

I certify that the information provided in this form is accurate to the best of my knowledge and that I am authorized to submit it for the organization identified. This signature confirms submission only; it does not create a consulting relationship, authorize work, or execute a separate NDA, Consulting Services Agreement, or Statement of Work.

Choose one signature method

☐ Handwritten signature☐ Electronic signature

Optional electronic signature

If I select Electronic signature and type or draw my name in the signature field below, I agree to conduct this submission electronically and intend that mark to serve as my electronic signature. I may instead print and sign by hand. A copy of the completed form should be retained for my records.

Printed legal name *

Title / role *

Signature - handwritten or adopted electronic signature *

Date signed *

Business email *