



GETTING STARTED

ONBOARDING & ANALYSIS



Onboarding Kick-Off

At Basswood, we follow a detailed onboarding process that's designed to set you up for lasting success.

Your dedicated management team will start by introducing you to secure and convenient communication tools, that support effective collaboration.

Operational Analysis

You'll be guided through the Analysis phase, as we collect information necessary to develop a comprehensive understanding of your business operations.

This phase allows us to establish a customized management strategy and ensure your system is tailored to your specific needs.



Financial Data

Access management software and identify all banking accounts



Sales Channels

Review sales items, sales processes, and sales tax compliance



Expenses

Identify recurring and expected business expenses



Assets & Loans

Collect documentation for current assets and loans



Employment

Review pay structures, formats, schedules, and benefits



Tax Returns

Determine tax filing preferences, goals, and concerns