Klarstig

# Finance Professional Services Closing Checklist

**FICTIONAL EXAMPLE FOR ILLUSTRATION. NAMES, ADDRESSES AND NUMBERS ARE INVENTED.**

Work through the checks for the activity and record exceptions. Mark a step complete only when its required evidence is available.

## Contact and reference

**Organization using this document**

Maple Street Community Center

**Your name or contact reference ***

Alex Rivera

**Email for a reply if needed**

alex.rivera@example.com

## Information for this document

**Date of checks ***

November 14, 2026

**Person performing checks ***

Facilities lead: entrance repairs by 30 November. Program coordinator: updated sign-in process by 5 December.

**Access permissions reviewed ***

Pending

**Equipment and supplies checked ***

Complete

**Required information shared with the team ***

Pending

**Records and handover updated ***

Complete

**Unfinished items and exceptions**

Two boxes of children's winter coats (sizes 4-10) and three unopened packs of socks.

**Follow up owner and due date**

Facilities lead: entrance repairs by 30 November. Program coordinator: updated sign-in process by 5 December.

## Specific details

**Site or service being closed and closing time**

Complete when relevant to this request.

Operations

### Cash records access and equipment requiring final checks

(Free-text answer - not filled in for this example)

## Operating context

### Client engagement and service area

Complete when relevant to this request.

Operations

### Deliverables review contacts timing and confidentiality instructions

(Free-text answer - not filled in for this example)

## Team specific details

### Cost center ledger or finance reference

Complete when relevant to this request.

Operations

### Budget allocation authorization reconciliation and supporting evidence

Photos of the entrance (3), the November sign-in sheets and the maintenance ticket MT-2026-0142.

## Limitations and what needs setup

- Submitting the form records the answers in your workspace. It does not approve, schedule, charge or reply on its own unless you add that step to the workflow.
- Email notifications, approval routing, document generation and connections to other systems are available but not switched on until you configure them.

### Want help tailoring this form? Free, Starter and Pro include five personal setup sessions, up to 30 minutes each, per new organization.

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