

Before You Close Client Access

A five-step exit review for freelancers and small agencies

THE EXIT REVIEW

- 1 Inventory**
List every account, workspace, file store, repository, domain and automation.
- 2 Name the client owner**
Each transferred asset needs a real receiving person or team.
- 3 Choose the action**
Transfer, remove access, export, retain temporarily or confirm no action.
- 4 Keep secrets out**
Use a password-manager item label. Never paste a password, token or key.
- 5 Save evidence**
Record a ticket, audit-log ID, delivery receipt or confirmation reference.

DO NOT CLOSE THE ROW WHEN

the client owner is unnamed;
an export, access change or confirmation is still open;
a temporary retention period has no end date; or
you cannot point to non-sensitive evidence that the step happened.

BOUNDARY

This sheet organizes a closeout. It is not a password manager, security audit, legal opinion or retention policy. Verify each change in the real platform and follow the client's contract, administrator rules and approved data policy.