Date: [Insert Date]

To: [Client Name / Point of Contact]
Company: [Company Name]

Subject: Transition of Outsourced CFO Duties

Dear [Name],

This letter serves as a formal plan for the transition of Outsourced Chief Financial Officer services from [Current CFO/Firm Name] to [Successor Name/Internal Contact]. Our goal is to ensure a seamless transfer of financial oversight and strategic continuity for [Company Name].

1. Effective Date
The formal transition period will begin on [Start Date] and conclude on [End Date]. As of [Final Date], [Successor Name] will assume full responsibility for CFO functions.

2. Key Areas of Responsibility
During this period, we will transfer management of the following:

- Financial Reporting and Analysis
- Budgeting and Forecasting Models
- Cash Flow Management and Treasury
- Tax Compliance and Audit Coordination
- Investor Relations and Board Reporting

3. Knowledge Transfer and Documentation
The following items will be handed over to the incoming team:

- Access credentials for accounting software and banking portals.
- Current year-to-date financial statements and work papers.
- A calendar of recurring regulatory and internal deadlines.
- Documentation of specific internal controls and accounting policies.

4. Outstanding Projects
We have identified the following pending items that require immediate attention during the transition:

- [Item 1: e.g., Audit in progress]
- [Item 2: e.g., Pending loan application]

5. Communication Plan
To facilitate a smooth handover, we have scheduled weekly briefing meetings on [Day of Week] at [Time]. After the effective date, [Current CFO Name] will be available for limited consultation via email until [Consultation End Date].

We appreciate the opportunity to have served as your Outsourced CFO and are committed to a professional and efficient handover.

Sincerely,

[Your Name]
[Your Title]
[Your Firm Name]

Acknowledged by:

____
[Client Representative Name]
[Date]