

Menu of Packages and Services

Take advantage of our monthly service packages to streamline your bookkeeping needs and budget.

Based on feedback from our clients, we have developed a simple yet comprehensive pricing structure to take the guesswork out of paying for your bookkeeping services.

These packages are built to evenly spread your bookkeeping costs throughout the year via a simple monthly payment so that you can streamline and budget more easily. Choose the package that fits best with your needs:

Premium package

This is the best option for busy business owners who want the maximum out of their accounting system and get access to the key metrics so they can make the best business decisions based on the best quality information.

Enhanced package

This is our most popular option because you get valuable monthly reports to help you manage your business, general advice and we'll even produce your year-end accounts for free.

Essential package

This option is best for those business owners who are simply looking to get the basic entries done to ensure being compliant with the Internal Revenue Service.

YOUR OPTIONS IN DETAIL	PREMIUM	ENHANCED	ESSENTIAL
Analyze and select the best accounting solutions	●	●	●
Company onboarding and financial systems integration	●	●	●
Subscription to paperless expense tracking	FREE	FREE	FREE
Basic user training	●	●	●
Access to Intuit Platinum Support through your QB Certified ProAdvisor	AS NEEDED	90 min/ Quarter	90 min/ 1x
Protected document sharing through secure portal	●	●	●
Anytime Online Appointment Scheduling	●	●	●
Access to video based QuickBooks and Bookkeeping Training	●	●	●
Continuous tax training and diligence to maximize your tax deductions	●	●	●
Tracking and posting of all business transactions	●	●	●
Completing monthly bank reconciliations	●	●	●
Posting of vendor bills and payments	●	●	●
Posting and reconciliation of credit card transactions	●	●	●
Monthly A/R and A/P reports	●	●	●
Monthly Sales Tax reporting	●	●	●
Monthly Sales Tax preparation	●	●	●
Posting of payroll journal entries	●	●	●
Unlimited Email and Telephone support	●	●	●
Maintenance of Fixed Asset Register	MONTHLY	ANNUALLY	
Remote QuickBooks Support	●	4 /MONTH	2 /MONTH
Full monthly Management reporting	●	●	
Basic quarterly Management reporting			●
Expense monitoring and advice	UNLIMITED	5 KEY EXPENSES	
Monitoring of Accounts Receivable	●	●	
Monitoring of Accounts Payable	●	●	
General Ledger Review for tax preparation	FREE	FREE	
Annual 1099 Misc Reporting	●	●	
Enhanced Credit Control	●		
Virtual (online) or in person business review meetings	WEEKLY	MONTHLY	QUARTERLY
Fully integrated cloud financial systems	●		
Cloud-based or desktop accounting software provided at no additional charge (up to \$720 value annually)	FREE	FREE	

Popular add-on services

- ◆ Payroll
- ◆ Business tax returns
- ◆ Individual tax returns
- ◆ Consulting and coaching
- ◆ Monthly Budget reports
- ◆ Cash Flow Reports
- ◆ Clean Up Services
- ◆ On-site support