

Our Services

NO CLIENT IS TOO BIG OR TOO SMALL.

We offer three comprehensive service packages to fit every client's distinct size and budget, so you only pay for the support you need.

	GOLD	MAROON	SILVER
Bookkeeping			
Monthly/Quarterly Financials	✓	✓	✓
Accounts Payable (bill.com)	✓	✓	✓
General Ledger	✓	✓	✓
Bank/Credit Card reconciliation	✓	✓	✓
Fixed Assets	✓	✓	✓
QuickBooks Online setup	✓	✓	✓
Expense report tracking & entering	✓	✓	✓
Payroll/Benefits Admin - ADP (401k, W2)	✓	✓	✓
TAX			
Tax Return Prep	✓	✓	✓
Individual	✓	✓	✓
Sole Proprietor	✓	✓	✓
Partnerships	✓	✓	✓
S Corps	✓	✓	✓
C Corp	✓	✓	✓
Non-profit Tax	✓	✓	✓
Annual 1099/1096 reporting	✓	✓	
Sales Tax Filings/reporting	✓	✓	
Quarterly Estimates	✓	✓	
Tax Planning	✓	✓	
CFO/COACHING			
Capital Raising/Structure	✓		
Cash Flow Projections/Budgeting	✓		
Identifying & analyzing key metrics that drive the business	✓		
Financial Analysis	✓		
Sounding board to owner	✓		
Accounting oversight	✓		
Strategic Planning	✓		
Closing Profit Leaks	✓		
Process Improvements	✓		
Acquisition & exit consulting/planning	✓		

Package pricing is based on individual business needs.