

Choose a Package That Suits Your Needs

	Deliver	Enhance	Scale
	Gain a financial department for your business	Get segment-level visibility and take your business to the next level	Our premium package gives you a CFO in your back pocket
	Starting at \$625/mo¹	Starting at \$1,650/mo¹	Starting at \$2,500/mo¹
SERVICE FEATURES			
Bookkeeping			
Transaction entry and coding	2x Monthly	2x Monthly	Weekly
Monthly reconciliations (the following month)	By the 20th	By the 15th	By the 10th
Year-end tax package	✓	✓	✓
Client portal	✓	✓	✓
Actionable and optimized chart of accounts	✓	✓	✓
Sales and excise taxes (+\$50 per additional filing)	2 Jurisdictions	2 Jurisdictions	2 Jurisdictions
1099 tracking and filing	✓	✓	✓
Bill Payments & AP Management			
Rule and approval threshold definitions	✓	✓	✓
AP management software setup	✓	✓	✓
Receipt management	✓	✓	✓
Invoicing & AR Management²			
Recurring payment and subscription setup	✓	✓	✓
Incremental / Milestone invoicing	✓	✓	✓
Automated notification setup	✓	✓	✓
Payroll Management			
Payroll	Add-on ³	Add-on ³	Add-on ³
Proactive Financial Reviews			
Data updates via email	2x Monthly	2x Monthly	Weekly
Monthly financial package	By the 20th	By the 15th	By the 10th
Partner financial reviews	Monthly Pre-Recorded Update	2x Monthly Accounting Manager Updates (Zoom)	2x Monthly CFO Strategic Review (Zoom)
Strategic Advisory Services			
Finance dashboard w/ KPIs		Standard	Custom
Budgets and projections		Annual	2x Annual
Segment analysis via project, department, etc.		✓	✓
Growth and goal planning			✓
Monthly Cash Flow Forecasting			✓
Support			
Dedicated accounting manager	✓	✓	✓
Bookkeeping support	Portal, Email, SMS, Scheduled Calls	Portal, Email, SMS, Scheduled Calls	Portal, Email, SMS, Scheduled Calls
CFO support		Email	Monthly Review Call and Email Support
Response time	Next Business Day	Same Business Day	Same Business Day
Urgent requests (same day response)	10 per year	Unlimited	Unlimited
Nightly QBO backups	✓	✓	✓

¹ Pricing does not include QBO, bill.com, and payroll provider software costs.

² AR Management does not include collection phone calls to clients, only emails.

³ Payroll fee determined by # of employees and pay frequency. \$100/mo minimum. Contact us for details.