

Core Service Package and Additional Services

Businesses tend to need the same financial support at each stage of their growth. Let us perform those financial services for you, so that you can focus on managing and growing your business successfully.

Our basic service provides the business owner with the information required to control expenses and understand the financial health of their business on a monthly basis. This compliance level bookkeeping also puts your financial reports in proper condition for tax preparation.

Quite often, additional services allow business owners an extra edge to maximize margins as they grow. See our Additional Services

CORE SERVICE PACKAGE

Our monthly bookkeeping package is the same for each type of business, starting at \$49/month.

This package includes:

- Bookkeeping utilizing bank feeds from your Quickbooks online (QBO) account.
- Monthly reconciliation of up to 2 bank accounts, and 2 credit cards
- Monthly financial reports emailed to you
- Year End financials ready for business tax return preparation.
- Secure digital storage of tax returns in our client portal. (Accessible by business owner at any time)
- One email monthly with financial questions.

Price for this service starts at \$49/month, and grows depending on your business type and volume. See the drop down menus under Services and Pricing to select your specific needs.

Contact us for a free consultation and to select the most beneficial package, or to customize your package.

ADDITIONAL SERVICES

Quite often, additional services allow business owners an extra edge to maximize margins as they grow. Select only those options that will help your business.

Quickbooks Online – Our wholesale pricing from Intuit allows us to provide you with QBO at a lower price than the current retail price.
\$25/Month

Corporation Setup – Do you need to file for a Corporation? We will file with your state, register for your EIN and if appropriate, file forms for an S-Corporation.
\$450 One time charge, State fees are additional.

Weekly Bookkeeping – Need your account reconciliation more frequently than monthly? This provides weekly reconciliation of your transactions.
\$15/Month

Unlimited Support – This add on provides you with unlimited emails and phone calls to our staff for assistance during regular business hours
\$60/Month

Audit Defense/Notice Response – When the IRS generates letters or performs audits, we will reply to the IRS in writing or by phone.
\$10/Month

Tax Planning – Many businesses can significantly reduce their tax burden through strategic tax planning and implementation throughout the year.
\$55/Month

Rental Properties – Special tax filings are required for rental properties. This fee for each property ensures proper reporting of rental income and expenses.
\$13/Month/Property

Local Taxes – For areas that require separate tax returns for local taxes, they can be confusing. Let us prepare these taxes for you.
\$13/Month

Accounts Receivable – Let us take care of the time consuming task of creating and sending invoices for you.
\$285/Month

Accounts Payable – Another item that we can take off your hands. We will receive your bills and make payments.
\$285/Month

Payroll – We can run payroll and file those returns for you. We will help you set up and ensure that quarterly and annual filings are completed on time and accurately.

\$100/Month + \$6/employee

Federal Tax Return - Required schedules prepared by CPA/EA. Priced based on complexity.

Contact for pricing

State Tax Return - Required schedules prepared by CPA/EA. Priced based on complexity.

Contact for pricing

Additional State Returns – If you require a second state return, add this package.

\$8/Month

Hand Written Checks – These checks still have their place, but do not allow us the efficiency of QBO electronic transfers

\$3/Check

QuickBooks training – Do you have questions on any aspect of Quickbooks? Our Quickbooks Pro Advisor can answer questions and provide training.

\$100/Hour