



## Our Services

What you get	Starting at:	Success	Evolve	The Starter
		\$1200	\$750	\$350
Posting all business transactions		☆	★	★
Completing monthly bank reconciliations		☆	★	★
Posting cash receipts		☆	★	★
Posting credit card transactions & reconciliations		☆	★	★
Completing monthly sales & expense ledger reconciliations		☆	★	★
Posting payroll journals		☆	★	★
Making adjustments for any foreign currency transactions		☆	★	★
Maximizing your tax deductions		☆	★	★
Unlimited e-mail & telephone support		☆	★	★
Basic management reporting every quarter		☆	★	★
Expense monitoring & advice		☆	★	
Precision accounting w/ accruals & prepayments		☆	★	
Full management reporting every month		☆	★	
1099 review & filing (additional fees for forms)		☆	★	
Completion of Sales Tax returns & filings		☆	★	
Daily/weekly posting from POS (when applicable)		☆	★	
Accounts payable review & reporting		☆		
Accounts receivable review & reporting		☆		
Year-end financial review		☆	★	★
Weekly reports on your key numbers		☆		
Quarterly online (virtual) biz review meeting		☆	★	
Communications with CPA		☆	★	★
Includes monthly subscription of QBO - cloud accounting software		☆	★	

## Profit First Services

Introduction to PF - Free Profit First Book	☆		
PDF of Core Chapters	☆	★	★
Profit First Instant Assessment (snapshot)	☆	★	★
Profit First Complete Profit Assessment (custom blueprint)	☆	★	
Kick-Off Meeting & Launch	☆	★	
Access to Profit First University Online	☆		
30-day Check-In	☆		
Monthly Financial Review	☆		
Monthly Profit Review & Strategy Assessment	☆		
Quarterly Profit Review Strategy Sessions		★	
Monthly Strategy Meeting - Goal Setting for TAPS	☆		
Quarterly Strategic Meetings	☆	★	
Perform the 10/25 allocation	☆		
Assistance with allocations		★	
Year End Profit Review - Financials and Profit Assessment	☆	★	
New Profit Assessment and Goal Planning	☆		

## Frequency of Contact

Monthly strategic meetings	☆		
Unlimited phone support	☆	★	
Unlimited e-mail support	☆	★	★
Response times	within 24 hours	48 to 72 hours	within 5 business days

