



Organized Books. Clear Insights. Confident Decisions.

Service Packages

Foundation Package - \$200/month

Reliable monthly bookkeeping for organized, accurate records

- **Includes:**
 - Monthly bookkeeping
 - Bank reconciliations
 - Financial statements
 - Monthly email summary

Clarity Package - \$300/month

Understand what your numbers mean and what needs your attention

- **Includes everything in Foundation, plus:**
 - Monthly financial review
 - Profit & loss explanation
 - Expense trend analysis
 - 30-minute monthly review call

Growth Package - \$450/month

Gain stronger financial oversight as your business grows

- **Includes everything in Clarity, plus:**
 - Accounts receivable tracking
 - Accounts payable tracking
 - AR/AP aging reports
 - Cash flow review



Simple. Organized. Stress-Free Finances.

Strategic Support- \$650/month

Your partner in financial organization and decision-making.

Includes everything in Growth, plus:

- Payroll support
- Budget review
- Cash flow planning
- Monthly financial strategy meeting
- Business finance action plan

Add-On Services

Accounts Receivable Support

\$75–\$150/month

Accounts Payable Support

\$75–\$150/month

Payroll Support

\$100–\$200/month

Monthly Financial Review

\$75/month

Budget & Cash Flow Planning

\$100/month

QuickBooks Training

\$75/hour

Cleanup Services

QuickBooks Cleanup Assessment

Free

Catch-Up Cleanup

Starting at \$300

Full Cleanup Projects

\$500–\$2,000+

(Depending on: Number of accounts, Months/years behind, Payroll complexity, Transaction volume)