



EXPERTISE

Assessment
 Planning
 Implementation
 Efficiencies

“Our clients on average experienced 10% growth in 2016”

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"Level up your business and achieve your dreams!"

PACKAGES

Rocket Fuel Package - \$2500 per month

This package is for a fast growing business who needs CFO access for strategic planning, cash flow management and profit improvement. CFO access may include lending assistance, lease contract review, or other financial consultations as needed. Development and monitoring of key financial metrics for growth and success Includes goal and vision setting meeting and monthly financial dashboard for financial breakthroughs. Preparation of annual budget and quarterly review of budget performance. Ongoing financial performance evaluation and tax planning includes monthly financial statement reports and budget vs. actual report. The package also covers regular bookkeeping activities for monthly bank account reconciliation for up to 3 bank accounts with up to 500 transactions for all accounts, reconciliation of 2 business credit card accounts, and processing vendor invoices up to 100 per month. **

Financial Check Up Package - \$1500 per month

Financial check up package will keep your business running smoothly throughout the year. The package includes CFO access for monthly strategic plan review and profit improvement goals. Quarterly review of financial performance and tax planning to ensure ongoing financial stability includes copies of financial metrics and tax planning documentation as it is created. Preparation of monthly financial reports: Balance Sheet, Income Statement as well as monthly bank reconciliation for up to 2 bank accounts with up to 250 transactions for all accounts, and reconciliation of 1 business credit card account. **

Basic Accounting Package - \$750 per month

The basic accounting package covers all your must have basics to ensure your business books are kept up to date. Monthly bank account reconciliation for up to 2 bank accounts with up to 250 transactions for all accounts. Reconciliation of 1 business credit card account and CFO oversight of prepared monthly financial reports: Balance Sheet, Income Statement for owner review. **

See back side for available Package Add-Ons

** Additional services may be added on at any time at the standard hourly rate.