

# How can we help?

## SERVICES



### BASE

You're here for the basics. As you work on running and growing your business, we'll help keep your books in order and keep you squared away with the IRS.

#### SERVICES

100% Tech Driven Accounting Process

Sales Tax Filing

1099s Preparation and Filing

Corporate Tax Return

Streamlined Payroll Management

Quarterly Financial Statements

Annual Strategic Review for Improved Decision Making and Growth

#### SUPPORT

Unlimited Bookkeeping Support  
3 day Response Time

#### TECHNOLOGY

Quickbooks Online  
Gusto  
Dext



### SCALE

Your business is growing, and it's time to ramp things up. Instead of having to hire a full time employee, this package keeps your basics covered plus extra services like accounts payable, more real time data, and more support.

#### SERVICES

100% Tech Driven Accounting Process

Sales Tax Filing

1099s Preparation and Filing

Corporate Tax Return

Streamlined Payroll Management

Quarterly Financial Statements

Semi-Annual Tax Efficiency Call

Automated Bill Pay Process

Inventory Discrepancy Identification and Reconciliation

Semi-Annual Strategic Review for Improved Decision Making and Growth

#### SUPPORT

Unlimited Bookkeeping Support  
CFO Support 1x Monthly  
2 day Response Time

#### TECHNOLOGY

Quickbooks Online  
Gusto  
Dext  
Bill.com



### SUMMIT

You're all in. This package goes above and beyond a typical accounting service. We'll be a trusted partner, handling complex tasks like accounts receivable, analyzing KPIs, and helping you take your business to another level.

#### SERVICES

100% Tech Driven Accounting Process

Sales Tax Filing

1099s Preparation and Filing

Corporate Tax Return

Streamlined Payroll Management

Monthly Financial Statements

Semi-Annual Tax Efficiency Call

Automated Bill Pay Process  
Inventory Discrepancy Identification and Reconciliation

Automated Sales Invoicing for Faster Payment Receipt

Quarterly Cash Flow Forecasting

Quarterly KPI Review

Quarterly Strategic Review for Improved Decision Making and Growth

#### SUPPORT

Unlimited Bookkeeping Support  
CFO Support 3x Monthly  
Same day Response Time

#### TECHNOLOGY

Quickbooks Online  
Gusto  
Dext  
Bill.com  
Fathom