Accounting

- Our goal with all of our Accounting clients we have the opportunity to work with is to create a partnership in every aspect of their Accounting needs.

- We can provide a service level where we are either:

    1. Your full accounting team, handling as much as a client wants to delegate, or

    2. We can trim our services all the way down to only reviewing and reconciling the bank and credit card statements. We will tailor our services to the individual organization.

- Our flat monthly rate makes it easy for our clients to budget for our service, regardless of the level they choose. Our proposals typically show 3-5 different pricing options, and we determine those options after we perform a mini-audit on your set of books. We determine a yearly cost, divide that number by 12, and that becomes our monthly fee.

- You will have access to a team of bookkeepers so vacations, sick times, and staffing will never be your concern.

- Financial reports are provided monthly, giving you up to date information needed to make decisions.

- Most of our Accounting staff have 15 years or more of experience, and many of them are also QuickBooks Pro-Advisors, so you'll have a team of advisors to lean on.

- Your books are stored in a cloud hosted environment which allows both you and your bookkeeper to be accessing the same set of books on a daily basis.

- We help complete your books at year end for tax purposes, which generally reduces your tax accounting fees. (Great spot to talk about our tax service)

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Initiate a Discovery call with Ashley Wilson to discuss the accounting services further. The point of the discovery call will be to go into greater detail with the prospect on the scope of our accounting service offerings, then prepare to build them a customized accounting services proposal. Always make it the goal to leave the initial meeting with a scheduled follow-up meeting, in this case the Discovery call. After the discovery call, be sure to schedule the proposal meeting and set their expectation to make a decision