



Packages | Price

CHOOSE YOUR LEVEL OF SUPPORT



Lite Package

STARTING AT: \$400/MO

A strong foundation for small businesses that need clean, accurate books and reliable monthly reporting.

- Categorize all transactions
- Transactions quality verification/documentation
- Invoicing
- Bill payment
- Process staff reimbursements and expense reports
- Monthly Profit & Loss and Balance Sheet reporting
- Unlimited email support
- Shared Google Drive access

Essentials Package

STARTING AT: \$700/MO

Everything in Lite, plus enhanced financial monitoring and payroll support.

Everything in Lite, plus:

- Accounts Receivable aging reporting
- Reconciliation of bank, credit card, and loan accounts
- Bi-weekly payroll services (QuickBooks subscription required)
- Employee payroll onboarding
- Monthly account review video conference

Premium Package

STARTING AT: \$950/MO

Full-scale financial and HR support for growing businesses that need seamless compliance and workforce management.

Everything in Essentials, plus:

- Employee tax processing
- Employee annual W-2 filing
- Onboarding of subcontractors (W-9, Work Comp, signed agreements)
- Process annual 1099 filings
- Employee Onboarding and Offboarding
- HR Compliance Management
- Employee Records Management
- Employee Relations

Expanded Package

STARTING AT: \$75/HR

Support for businesses needing additional financial or HR services.

Available à la carte:

- Financial Coaching & Strategic Planning
- Sales tax filing and payment support
- Collaborate with your tax preparer
- Staff training
- Annual budget creation & quarterly forecasting
- Bi-weekly payroll services
- Employee tax processing
- Employee W-2 filing