

# Monthly Bookkeeping



## Bookkeeping Essentials

Focus on what matters most with these automated tasks and expert support offered through our monthly bookkeeping services:

- Weekly categorization of business transactions
- Reconciliation of business bank & credit card accounts
- Financial reports package delivered monthly
- Client meetings (as needed by request)
- Year-round, unlimited email support
- Coordination with tax professional
- U.S. sales tax compliance (if applicable)
- Close books at end of year and prepare for taxes

Starting at \$500/month USD

➔ Financial reports package: Profit & Loss, Balance Sheet, Statement of Cash Flows, A/R and A/P Aging, and personalized dashboard.

➔ U.S. sales tax compliance: Preparing and filing sales and use tax returns, sales tax analysis and monitoring

### PLEASE NOTE:

1. For new QuickBooks Online account setups, a one-time setup fee of \$500 is required.
2. For existing accounts, a \$250 diagnostic review is required to determine bookkeeping scope of work.
3. Bookkeeping services are standard with no modifications to features but can be customized based on needs.

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