



Essential	Plus	Premier
Advisory <ul style="list-style-type: none"> ► Tax Advisory - Strategic Planning & Tax Optimization (3 PER YEAR) ► Email & Phone Support ► Business Advisory - Comprehensive Guidance for Business Growth ► Profit First Advisory 	Advisory <ul style="list-style-type: none"> ► Tax Advisory - Strategic Planning & Tax Optimization (3 PER YEAR) ► Email & Phone Support ► Business Advisory - Comprehensive Guidance for Business Growth ► Profit First Advisory 	Advisory <ul style="list-style-type: none"> ► Tax Advisory - Strategic Planning & Tax Optimization (MONTHLY) ► Email & Phone Support ► Business Advisory - Comprehensive Guidance for Business Growth ► Profit First Advisory
TAX <ul style="list-style-type: none"> ► Business Entity Federal Income Tax Return Prep and Filing ► Business Entity State(s) Income Tax Return Prep and Filing ► Personal (1040) Tax Return Prep and Filing ► Audit Protection ► Prepare and File Forms 1099 (up to 3) ► Prepare and File Sales Tax Return 	TAX <ul style="list-style-type: none"> ► Business Entity Federal Income Tax Return Prep and Filing ► Business Entity State(s) Income Tax Return Prep and Filing ► Personal (1040) Tax Return Prep and Filing ► Audit Protection ► Prepare and File Forms 1099 ► Prepare and File Sales Tax Return 	TAX <ul style="list-style-type: none"> ► Business Entity Federal Income Tax Return Prep and Filing ► Business Entity State(s) Income Tax Return Prep and Filing ► Personal (1040) Tax Return Prep and Filing ► Audit Protection ► Prepare and File Forms 1099 ► Prepare and File Sales Tax Return
MANAGEMENT REPORTING <ul style="list-style-type: none"> ► Financial Statemen Preparation (ANNUAL) ► Custom Reporting - Required reporting specific to parent companies, franchises, coaching programs 	MANAGEMENT REPORTING <ul style="list-style-type: none"> ► Financial Statemen Preparation (ANNUAL) ► Custom Reporting - Required reporting specific to parent companies, franchises, coaching programs (\$) 	MANAGEMENT REPORTING <ul style="list-style-type: none"> ► Financial Statemen Preparation (ANNUAL) ► Custom Reporting - Required reporting specific to parent companies, franchises, coaching programs and more
ACCOUNTING <ul style="list-style-type: none"> ► Reconcile of Bank & Credit Card Accounts (MONTHLY) ► Validate General Ledger Accuracy ► Maintain Fixed Asset Schedules and Loan Amortization ► Full accrual accounting ► Bill pay processing 	ACCOUNTING <ul style="list-style-type: none"> ► Reconcile of Bank & Credit Card Accounts (MONTHLY) ► Validate General Ledger Accuracy ► Maintain Fixed Asset Schedules and Loan Amortization ► Full accrual accounting ► Bill pay processing 	ACCOUNTING <ul style="list-style-type: none"> ► Reconcile of Bank & Credit Card Accounts (VARIABLE) ► Validate General Ledger Accuracy ► Maintain Fixed Asset Schedules and Loan Amortization ► Full accrual accounting ► Bill pay processing
TECH STACK <ul style="list-style-type: none"> ► Accounting Software (QBO) ► Payroll Service powered by YPD ► Receipt Management (Dext) ► Bill Payment (BILL) 	TECH STACK <ul style="list-style-type: none"> ► Accounting Software (QBO) ► Payroll Service powered by YPD ► Receipt Management (Dext) ► Bill Payment (BILL) 	TECH STACK <ul style="list-style-type: none"> ► Accounting Software (QBO) ► Payroll Service powered by YPD ► Receipt Management (Dext) ► Bill Payment (BILL)
ONBOARDING <ul style="list-style-type: none"> ► Kickoff call - Review deliverables, expectations, and establish client portal ► Initial Strategy Session (ISS) - Understand business's current state of operations and financials, establish Chart of Accounts ► Backwork - Clean up historical data to produce clean, up-to-date financials ► QBO/Dext training sessions ► Financial Statement Review Session (FSS) Review/discuss original financial statements vs Kaizen-produced statements 	ONBOARDING <ul style="list-style-type: none"> ► Kickoff call - Review deliverables, expectations, and establish client portal ► Initial Strategy Session (ISS) - Understand business's current state of operations and financials, establish Chart of Accounts ► Backwork - Clean up historical data to produce clean, up-to-date financials ► QBO/Dext training sessions ► Financial Statement Review Session (FSS) Review/discuss original financial statements vs Kaizen-produced statements 	ONBOARDING <ul style="list-style-type: none"> ► Kickoff call - Review deliverables, expectations, and establish client portal ► Initial Strategy Session (ISS) - Understand business's current state of operations and financials, establish Chart of Accounts ► Backwork - Clean up historical data to produce clean, up-to-date financials ► QBO/Dext training sessions ► Financial Statement Review Session (FSS) Review/discuss original financial statements vs Kaizen-produced statements
\$ xxx.xx/mo	\$ xxx.xx/mo	\$ xxx.xx/mo