



Service & Pricing Guide

BOOKKEEPING | PAYROLL | TAX PLANNING, PREPARATION, & FILING

Bookkeeping Plus, Inc.
Carla Ralston, President
EIN# 87-299256

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Welcome

Thank you for choosing Bookkeeping Plus! We are thrilled to have the opportunity to serve you. Whether you're looking for streamlined bookkeeping, efficient payroll management, or expert tax preparation and planning, our dedicated team is here to support you every step of the way — it's the PLUS!

About Us

Our President, Carla K. Ralston started Bookkeeping Plus in 1997 by preparing tax returns from her home. With a passion for helping individuals and businesses, Carla's commitment to quality service quickly gained traction. By 2009 the growing demand for her expertise led to the expansion of the business to its current location.



Today, Bookkeeping Plus, Inc. employs a team of professionals that serve a diverse array of clients throughout Middle Tennessee and beyond. With over 25 years of experience, our team is dedicated to helping you succeed by taking the complexity out of managing your financials. Whether you're a business owner or an individual looking for expert tax advice, Bookkeeping Plus is here to support you every step of the way.

Bookkeeping Services

We offer tiered packages designed to fit your business needs. Each package bundles monthly services with end-of-year items and tax planning. Pricing is based on the number of accounts and monthly transactions. Additional services can be added on to each package.

Starter Package \$200/month	<ul style="list-style-type: none"> Expense Tracking: Categorization and tracking of up to 25 transactions per month. Account Reconciliation: Monthly reconciliation for up to 1 account. Monthly Write-Ups: Profit & Loss Statement and Balance Sheet. Yearly Review: Annual financial review to prepare for tax season. Consulting/Tax Planning Meetings: 1 meeting per year. End of Year Items: 1099 Filing, Annual Report Filing, Business Tax/License Renewal, Tangible Personal Property Schedule.
Basic Package \$400/month	<ul style="list-style-type: none"> Expense Tracking: Categorization and tracking of up to 100 transactions per month. Account Reconciliation: Monthly reconciliation for up to 2 accounts. Monthly Write-Ups: Profit & Loss Statement and Balance Sheet Yearly Review: Annual financial review to prepare for tax season. Consulting/Tax Planning Meetings: 1 meeting per year. End of Year Items: 1099 Filing, Annual Report Filing, Business Tax/License Renewal, Tangible Personal Property Schedule.
Growth Package \$650/month	<ul style="list-style-type: none"> Expense Tracking: Categorization and tracking of up to 200 transactions per month. Account Reconciliation: Monthly reconciliation for up to 3 accounts. Monthly Write-Ups: Profit & Loss Statement and Balance Sheet Yearly Review: Annual financial review to prepare for tax season. Consulting/Tax Planning Meetings: 2 meetings per year. End of Year Items: 1099 Filing, Annual Report Filing, Business Tax/License Renewal, Tangible Personal Property Schedule.
Advanced Package \$1100/month	<ul style="list-style-type: none"> Expense Tracking: Categorization and tracking of up to 400 transactions per month. Account Reconciliation: Monthly reconciliation for up to 4 accounts. Monthly Write-Ups: Profit & Loss Statement and Balance Sheet Yearly Review: Annual financial review to prepare for tax season. Consulting/Tax Planning Meetings: 2 meetings per year. End of Year Items: 1099 Filing, Annual Report Filing, Business Tax/License Renewal, Tangible Personal Property Schedule.
Ultimate Package \$2500/month	<ul style="list-style-type: none"> Expense Tracking: Categorization and tracking of unlimited transactions. Account Reconciliation: Unlimited accounts. Monthly Write-Ups: Profit & Loss Statement and Balance Sheet Yearly Review: Annual financial review to prepare for tax season. Consulting/Tax Planning Meetings: 4 meetings per year. End of Year Items: 1099 Filing, Annual Report Filing, Business Tax/License Renewal, Tangible Personal Property Schedule.

Sales Tax Returns

We offer comprehensive Sales Tax Return services to meet the complexity and scale of your business.

Single Location - Standard \$75/return	<ul style="list-style-type: none">For businesses operating in one location with straightforward sales tax reporting needs.
Single Location - Complex \$225/return	<ul style="list-style-type: none">For businesses in one location with complex reporting needs or high transaction volumes.
Multiple Locations - Standard \$375/return	<ul style="list-style-type: none">For businesses operating in multiple locations with straightforward sales tax reporting needs.
Multiple Locations - Complex \$450/return	<ul style="list-style-type: none">For businesses operating in multiple locations with complex reporting needs or high transaction volumes.

Services will be billed based on your filing frequency (monthly, quarterly, or annually).

For monthly reporting, please ensure that your sales tax information is submitted to us by the 10th of each month. This allows us to process your return by the deadline on the 20th of each month.

Payroll Services

Our payroll pricing consists of a monthly base fee plus a per employee fee. We offer three tiers of pricing, allowing you to choose the level of support you need.

Essential \$90/mo \$8/emp/mo	Enhanced \$105/mo \$10/emp/mo	Deluxe \$120/mo \$12/emp/mo
<ul style="list-style-type: none"> • Bi-weekly, Semi-monthly, or Monthly Payroll Processing • Paystub Creation • Direct Deposit or Printed Checks • Tax Deposit Submission • Quarterly and Year-End Reporting including W-2's • Separation Notices • Standard Payroll Reports • Dedicated Payroll Assistance • New Hire Reporting • Employee Packets and On-boarding • Employer & Employee Portal Access 	Includes all services in the Essential Package plus: <ul style="list-style-type: none"> • Weekly Payroll • PTO Tracking per employee • Commissions • Contractors, 1099s • Benefits Administration • Garnishment Electronic Payment • Additional State Taxes (state other than TN) • Same-Day Processing (printed checks only) 	Includes all services in the Enhanced Package plus: <ul style="list-style-type: none"> • Custom Payroll Reports • HR Support • Unemployment Appeals • Worker's Comp Audit Completion • General Liabilities Audit Completion • Compliance Materials • Multiple Payroll Schedule Processing

Do you handle your own payroll but need assistance with tax deposits and report filings? Check out our Quarterly Report Packages! Get expert support and ensure compliance with ease.

Essential \$100/quarter	Enhanced \$175/quarter	Deluxe \$225/quarter
<ul style="list-style-type: none"> • Quarterly Payroll Tax Deposit • All Quarterly & Year-End Report Filings • Form 941 • Premium and Wage Report • Form 940 • W-2's • Basic Payroll Reports 	Includes all services in the Essential Package plus: <ul style="list-style-type: none"> • Monthly Payroll Tax Deposit • Worker's Comp Audit Completion • General Liabilities Audit Completion 	Includes all services in the Enhanced Package plus: <ul style="list-style-type: none"> • After-the-Fact Payroll • Weekly Tax Deposits • Payroll Assistance • Remote or On-site Services • HR Support • Compliance Materials • Additional State Taxes (other than TN)

Tax Services

Navigating the complexities of tax law can be daunting. Our tax services are here to help you maximize deductions, minimize liabilities, and ensure compliance.

- **Tax Preparation:** Professional preparation of federal, state, and local tax returns for individuals and businesses.
- **Tax Planning:** Proactive strategies to minimize your tax burden and make the most of available deductions.
- **Audit Representation:** Should you face an audit, we'll stand by your side, offering expert guidance
- **Year-Round Support:** Tax concerns don't just happen during tax season. We're available year-round to answer your questions and provide advice.

Our Bookkeeping Services play a crucial role in simplifying your tax return preparation. By maintaining accurate and up-to-date financial records, our bookkeeping team ensures that you have all necessary documentation at hand, making tax preparation smoother and more efficient.

Tax Return Pricing - Individuals & Sole Proprietors

Form 1040 - U.S. Individual Income Tax Return

Base Fee: \$125 + additional forms, schedules, and time if applicable

The schedule prices listed below are minimum values. Each tax return is unique and complexities may warrant higher prices.

- Schedule A - \$50
- Schedule C - \$300 (Average)
- Schedule D - \$50
- Schedule E - \$50 (Per Rental)
- Schedule F - \$300 (Average)
- Schedule H - \$50
- Schedule 1 - \$25
- Schedule 2 - \$25
- Schedule 3 - \$25
- K-1 - \$50

Tax Return Pricing - Businesses/Other

Prices listed are minimum values. Each tax return is unique and complexities may warrant higher prices. Fees will be adjusted according to additional schedules, forms, and time required to complete the return.

Form 990 - Return of Organization Exempt from Income Tax

Base Fee: \$400

Form 1041 - U.S. Income Tax Return for Estates and Trusts

Base Fee: \$150

Form 1065 - U.S. Return of Partnership Income

Base Fee: \$400

Form 1120-S - U.S. Income Tax Return for an S Corporation

Base Fee: \$400

Form 1120 - U.S. Corporation Income Tax Return

Base Fee: \$500

Tennessee Franchise and Excise (F&E) Tax Return

Base Fee: \$150

Tax Planning

Effective tax planning is key to minimizing your tax liability and maximizing your financial well-being. At Bookkeeping Plus, we offer tailored tax planning services to meet your specific needs throughout the year.

- **Two Tax Planning Meetings: \$400**
 - This package includes two comprehensive tax planning meetings, spaced strategically throughout the year. We'll review your financial situation, discuss tax-saving strategies, and ensure you are on track to meet your financial goals.
- **One Year-End Tax Planning Meeting: \$250**
 - Specifically designed for clients who prefer a focused approach in the last quarter of the year. This meeting will help you optimize your tax situation before year-end, ensuring that you take full advantage of available deductions and credits.

Other Tax Filings or Reports

- **1099 Filing:** \$50 + \$10 each
 - Includes verifying and validating vendor information and tax identification numbers, preparing and electronically filing 1099 forms, and providing copies to recipients and/or the client.
- **Annual Report:** \$50/year
 - Any business registered with the state is required to submit an Annual Report to the Secretary of State by April 1st of each year.
- **Annual Sales Report:** \$40/year
 - Requirement for motor vehicle dealers.
- **Business License Renewal:** \$75 per county and/or city
 - Businesses with a minimum activity license must renew their license at the City and/or County Clerk's office by April 15th of each year.
 - Businesses with a standard business license must renew and submit a business tax return online, through TNTAP by April 15th of each year.
- **Fuel Tax (IFTA):** \$80/quarter
 - For businesses that operate qualified motor vehicles and require International Fuel Tax Agreement reporting.
- **Heavy Use Tax Return (Form 2290):** \$80
 - For businesses with heavy vehicles subject to the Heavy Vehicle Use Tax.
- **Kentucky Weight and Distance Return:** \$80/quarter
 - For businesses operating in Kentucky that need to file weight and distance reports for transportation.
- **Occupancy Tax Return:** \$75/month
 - For businesses required to report and pay occupancy tax.
- **Tangible Personal Property Schedule:** \$100 (minimum)
 - Tangible schedules are to be completed and returned to the county assessor's office by March 1st of each year.
- **W-2 Filing:** \$50 + \$10 each
 - Includes preparing and electronically filing W-3 and W-2 forms, and providing copies to recipients and/or the client.

Secure Client Portal



At Bookkeeping Plus, we prioritize the security and convenience of our clients' financial information. To streamline communication and document exchange, we utilize the Client Center, a secure online portal. This platform allows us to request and deliver documents efficiently, ensuring that sensitive information is protected at all times while keeping your data safe and accessible whenever you need it. You will receive an email invitation to gain access to the portal.

Client Resources

We believe in keeping our clients informed and empowered. To support your financial journey, we offer a variety of resources:

- **Weekly Tax Tips:** Stay informed with tax tips delivered to your inbox every week.
- **Monthly Newsletter:** Our newsletter provides updates on the latest in tax law, bookkeeping best practices, and more.
- **Online Resources:** Visit our website for a collection of tax videos and other helpful information.
- **Blog & Email Updates:** We update our website blog and send out emails to announce important tax law changes, deadlines, and other relevant information.
- **Social Media:** Follow us on Facebook, Instagram, LinkedIn, and X to stay connected.

Next Steps

- **Review and Sign Engagement Letter:** Once we've identified your needs, a detailed Engagement Letter will be emailed to you outlining our services, fees, and expectations. Please review this agreement and let us know if any adjustments need to be made.
 - **Set Up Portal Access:** You will receive an email invitation to set up your login for the Client Center. Follow the instructions in the email to create your account and access the portal.
 - **Submit Authorization Forms:** Complete and submit any requested authorization forms.
 - **Provide Necessary Logins:** Supply any necessary login credentials for your accounts, such as bank accounts, payroll systems, etc.
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Contacts

- Bookkeeping Department: **info@bkpweb.com**
- Payroll Department: **payroll@bkpweb.com**
- Tax Department: **tax@bkpweb.com**
- For **general inquiries** call our office at **931-685-0503** or email **office@bkpweb.com** to speak to our administrative staff.

Our Office Hours are Monday through Friday from 8:00 AM - 4:30 PM.