

1 Explore

Either by phone, Zoom, or in-person at your business, we will delve into all aspects of your business, determine your needs, and discuss how we can best help you meet your goals. There will be a ton of questions which may seem extreme, but this foundational step allows us to dive deep and see where to go next.

2 Review

Where have you been? How far have you come? We'll take a look at your current accounting systems and processes and highlight any potential issues. Do we just need to clean up a bit and pick up from where you left off or is it better to start from scratch? Where do you stand with your tax filings? Our review will help us to define our plan of action.

3 Proposal

We took copious notes and evaluated your current state of affairs. Now we will design a "Goldilocks" package that's "just right" for you and your business. Our proposals include time-lines and pricing upfront. No hidden fees. If you opt for a monthly plan, you can cancel anytime with 20 days written notice.

4 Action

Once you've accepted our proposal, we'll gather the relevant information and get rolling! We'll work through who is responsible for what, and when deliverables are due. I'll show you how to most effectively feed information to me for timely action. You and I will soon be a collaborating dream team!