



Virtual CFO Tier 1 Compliance Package

Starting \$2,000 / Month

Client Size 0-5 Employees

Basic Bookkeeping & Tax Planning

Virtual Meeting 1X / Month

Quarterly Meetings

Unlimited Emails (3 Day Response Time)

1.) Advise & Help with Daily Tax and Financial Tasks:

- Licensed IRS Enrolled Agent on Call. (5 Day Response Time)
- Keep your business in compliance with new IRS, State and Local Tax Laws.
- Oversee Financial matters avoiding Fines or Legal Action. (Peace of Mind)
- Assistance with Financials Matter

2.) QuickBooks Setup: (One Time)

- Link Accounts to QB's (Banks, Square, Stripe, Avalara, Housecall Pro, Amazon, Etc.)
- Set up Chart of Accounts
- Set Rules and Classes
- Track Income & Expenses
- Track Miles Correctly
- Maximize Tax Deductions
- Employee/Contractor GPS time & Location Tracker (Add on)

3.) Preparing QuickBooks Reports Such As: (Quarterly)

- Profit & Loss Reports
- Accountant & Tax Reports
- Balance Sheet
- Banking Reports
- Banking Reconciliation
- Class Tracking
- Custom Financial Reports

- Customers & Receivables Reports
- Employees & Payroll Reports
- Expenses & Vendors
- Inventory Reports
- Jobs, Time & Mileage
- Purchase & Sales Reports
- QuickBooks Projects (Track Labor Costs and by Customer or Job)

4.) Payroll Services: (Bi-Weekly / Monthly) (Add on)

- Set Up Employee Payroll
- Entering Time Sheets
- Processing Employee Payroll
- Process Monthly and/or Quarterly Shareholder Distributions
- Uploading Third Party Payroll Reports
- Manage Accounts Payable & Receivables
- Collect Overdue Receivable
- Prepare Monthly, Quarterly & Yearly Payroll Taxes with Taxing Authorities

Creighton Spies EA

IRS Enrolled Agent

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Schedule an Appointment:

<https://calendly.com/spiestax>