



Tiered Packages

Features & Deliverables	Essential \$350	Growth \$600	Premium \$1,050
Bank & Credit Card Reconciliation	✓ Monthly	✓ Monthly	✓ Monthly
Expense Categorization	✓	✓	✓
Financial Statements (P&L, Balance Sheet)	✓ Monthly	✓ Monthly	✓ Monthly + KPI notes
Email Support	Standard (24-48 hr)	Priority (24 hr)	Priority (same day)
Accounts Payable/Receivable Tracking	—	✓	✓
Monthly KPI Summary & Variance Notes	—	✓	✓ Detailed
Quarterly Review Call	—	✓	✓
Cash Flow Forecasting	—	—	✓
Budget Tracking & Advisory	—	—	✓
CPA/Tax Preparer Liaison	—	—	✓
Workflow Automation Setup (rules, reminders)	—	—	✓

Pricing may vary for each client