

PICK YOUR PACKAGE	QUARTERLY STRATEGY	MONTHLY PARTNERSHIP	EXECUTIVE CFO ADVISORY
Investment	Starting at <b>\$2,000+</b> /month	Starting at <b>\$3,500+</b> /month	Starting at <b>\$7,500+</b> /month
Monthly Bookkeeping & Reconciliation	✓	✓	✓
Support from your dedicated Bookkeeper & Account Manager	✓	✓	✓
Financial Reporting	✓	✓	✓
Secure client portal for file sharing/communication	✓	✓	✓
Deep-dive financial review with dedicated account manager via Teams	Quarterly Reviews	Monthly Reviews	Monthly Reviews
Advanced Financial Reporting		✓	✓
Proactive Quarterly Tax Projections & Strategy		✓	✓
Job Costing (if applicable)		✓	✓
Strategic Forecasting & Budgeting			✓
Team Incentive Plan Creation			✓
Collaborative Goal Settings with Measurable Milestones			✓
Cash Flow Optimization to Fuel Sustainable Growth			✓
Systems Optimization/CRM Integration			✓
Ongoing Email Support - with a Promise of Response within 24 Business Hours	✓	✓	✓