

Virtual CFO Tier 2 Proactive Package

Starting $4,000 / Month

Client Size 0-10 Employees

Proactive Tax Planning

Virtual Meeting 2X / Month

Quarterly Meetings

Unlimited Emails (3 Day Response Time)

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

- Licensed IRS Enrolled Agent on call. (3 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 Financial Matters

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: (Monthly)

- 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 & Job Profitability)

4.) Payroll Services: (Weekly / Bi-Weekly)

- 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

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Schedule an Appointment:
https://calendly.com/spiestax