If one of my standard bookkeeping packages doesn’t quite suit your needs, choose from these add-ons and other services. We’ll create your customized package together.

**ADD-ONS**

* Additional Accounts (checking/credit) – $25 each/month
* Accounts Receivable/Invoicing – based on volume
* Accounts Payable/Bill Pay – based on volume
* Payroll Processing – includes compliance reporting, based on number of employees
* Sales Tax Management and reporting - $20/month
* Weekly Bookkeeping and Reports - $70/month
* Customized Invoicing – Your brand in accounting software - $35 setup fee
* Customized Financial Reporting – Get insight into specific areas of your business - $35/month
* E-commerce, Inventory or Job Costing - $100/month
* Budgeting and Cash Flow Management - $70/month
* Historical Cleanup – Get your bookkeeping caught up and organized – based on time required for cleanup
* Benchmarking with Your Industry - $70/month
* IRS 1099 Filing - $50 for up to 10 contractors
* Tax Planning using Tax Planner Pro - $70/month

**TAXES**

Many businessowners dread tax time because of the additional paperwork burden, confusing tax forms, and compliance uncertainty. I only prepare tax returns for my bookkeeping clients, so they receive the professionalism and individual attention they deserve.

When tax time comes around, your books are already in order, and we’ve already strategized to ensure you receive every credit and deduction you’re entitled to. Completing and filing your tax returns will be as simple and stress-free as possible, especially for you. And the cost will already be bundled into your monthly bookkeeping fee.

Personal – Starting at $250

* Form 1040
* Schedule A
* Single state

Sole Proprietorship/LLC – Starting at $450

* Form 1040
* Schedule A
* Schedule C
* Single state

Partnership – Starting at $600

* Form 1065
* Issue K-1s

S-Corporation – Starting at $750

* Form 1120S
* Issue K-1s

\*Prices include the most common tax forms for each scenario and do not include cost of excess research to establish documentation of sustainable position.

**OTHER SERVICES**

Software Setup and Training – Starting at $250

If you’d like to handle your own bookkeeping but need help getting started, we’ll spend up to two hours organizing and setting up your accounting software and learning to use it.

* Set up and sync new accounts
* Reconcile accounts
* Produce financial reports
* Create and send invoices
* Remit accounts payable
* Follow-up email communication or troubleshooting for 1 month

Corporation Setup - $400 + state fees (vary)

If you’re ready to file as a corporation or LLC, setup includes:

* Name availability search
* Obtain Employer Identification Number
* File appropriate documents with your state
* Certificate of Filing or stamped formation documents
* Custom Corporation/LLC kit and seal
* Registered Agent for first year, if needed

S-Corporation Filing - $35

Tax Preparation – See Rates

Your annual tax preparation fees can be rolled into your monthly Package cost.

Personal Finance – Starts at $35/month

Manage your personal finances including budgeting, reconciliations and bill pay.

Money Guide

Together we’ll create a success road map so you can gain control over your money, and I’ll coach you through the four major areas of financial competence: Mental, Mission, Method, and Motion. Is it easy? No. Is it worth it? Yes!

**GETTING STARTED**

Let’s create a custom bookkeeping services package just for you. Here’s what we need to do.

1. Email me at [Kim@TheIntuitiveBookkeeper.com](mailto:Kim@TheIntuitiveBookkeeper.com) and provide me with:
   1. Your first and last name.
   2. Your business name.
   3. Your communication preference (phone, text, or email).
   4. Office phone.
   5. Cell phone.
   6. Email address.
   7. Website ULR.
   8. Type of business (sole proprietorship, LLC, Partnership, S-Corp, Corporation, Non-Profit, Other).
   9. The services you are interested in.
2. I’ll send you a new client questionnaire to complete and return to me.
3. Upon receipt of your completed questionnaire, I’ll contact you to set up a free 30-minute phone consultation.
4. I’ll create and send you a proposal to fit your specific business needs.

Once we’ve decided that we’re a good fit and agreed on which services I’ll be providing you,

1. I’ll send you an Engagement Letter, New Company Set-Up Checklist, and Recurring Payment Authorization Form to complete and return to me.
2. I’ll send you instruction for uploading your documents into a ShareFile folder so I can access them.
3. I’ll perform the on-boarding process with minimal interruption to you and your business.
4. You’ll focus on your business, free from bookkeeping stress.

I look forward hearing from you and getting started! - Kim