



# Inteli-K

Start On Acceptance



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## Introduction

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### Greenlight Financial

Dear Argenis Lopez,

We are pleased to offer our Bookkeeping – Recurring Services, designed to provide consistent, accurate, and timely financial management for your business. Our goal is to keep your books up to date each month so you can make informed decisions with confidence.

Please note that work will begin once the proposal is signed and payment has been received.

If you have any questions, please contact Valeria Forsyth at [vforsyth@greenlightfinancial.net](mailto:vforsyth@greenlightfinancial.net) or (786) 706-9047.

Thank you for choosing Greenlight Financial. We look forward to supporting your business.

Best regards,



# Services

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## 1099 Filing Service

Our 1099 Issuance Service streamlines the process:

- 1. We collect recipient details and payment information.
- 2. Our system generates accurate and IRS-compliant 1099 forms.
- 3. Thorough accuracy checks are conducted before issuance.
- 4. Customization options are available to fit your needs.
- 5. Timely delivery to meet tax season deadlines.
- 6. Your data is handled securely for confidentiality.



# Pricing

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Billed on acceptance	\$0.00
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✓ 1099 Filing Service

# General Terms and Conditions

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## PROPOSAL FOR SERVICES

Argenis Lopez

January 8, 2026

### EXECUTIVE SUMMARY

Greenlight Financial, LLC provides strategically oriented, financial, and operational analysis as well as bookkeeping services. With a base of numerous clients with revenue up to \$50M, Greenlight Financial has a proven track record of helping guide companies and organizations through streamlining their operations and in turn becoming more efficient and profitable. In particular, Greenlight Financial focuses on the following services:

- Financial Analysis and Forecasting
- Financial Procedures and Controls
- Operational and Efficiency Analysis
- Bookkeeping and Management Reporting

### SCOPE OF WORK FOR BOOKKEEPING

#### Phase One – QuickBooks Set-up

- Review all general preferences
- Review all key corporate information and data
- Review income, expense, credit card, and bank accounts
- Review and modify chart of accounts
- Review item list and link to a chart of accounts

#### Phase Two – Data Population

- Review all bank information and data
- Review all deposits and cash transfers between accounts
- Review bank reconciliations

Phase Three – Financial Reporting and Data Review:

- Review accuracy of information
- Profit & loss statement
- Balance sheet

**Quarterly:**

Bookkeeping Recurring

*Financial Reporting and Bookkeeping Services*

- Process key documentation
- Process key corporate information and data
- Process all deposits and cash transfers between accounts
- Process income, expense, credit card, and bank accounts
- Review and analyze cost-cutting alternatives
- Bank reconciliation
- Profit & loss statement
- Balance sheet
- Tax liaison to mitigate tax implications

**Signature:**

*Your Name*

**Date: January 8, 2026**

## **TERMS AND CONDITIONS**

**Payment Terms.**

Statements and invoices for the Company's services and associated costs will be submitted to the Client on a monthly/milestone basis and are due upon receipt. Any payments made on past due statements are applied first to the oldest outstanding balance.

**Additional Services.**

In the event that the Company is requested to render services in respect to other matters not covered by this Agreement, those additional services will be handled on the same basis as set forth herein, and the associated fees and costs will be payable under

the same terms and conditions as provided herein. The amount of such fees and costs shall be negotiated between the parties on a case-by-case basis.

#### **Billing Procedures.**

In the event payment by Client is not made when due or invoiced, the Company shall charge a late fee of 1.5% per month on the amount past due.

#### **Cancellation Charges.**

This Agreement shall be subject to the following cancellation charges: (i) 10% of the total price set forth above after order entry; and (ii) 20% of the total price after or during production. Once production has begun, charges will be based on percentage of schedule completed plus 30% of the total amount for termination. These charges shall in no event be considered liquidated damages.

#### **Right of Possession.**

The Company shall have the right, for credit reasons or because of the Client's default, including non-payment, to withhold any of the work product, in whole or in part, and to recall or take possession of any work product.

Until final payment is made to the Company for the project hereunder, the work product shall be subject to a security interest in favor of the Company, and the Client hereby grants a power of attorney with interest to the Company to file one or more financing statements on its behalf to evidence such security interest.

#### **Independent Contractor.**

The relationship between Company and Client shall be solely as independent contractor and neither party shall be deemed a joint venturer, partner agent, representative or employee of the other.

#### **Confidentiality.**

Each party to this Agreement (a "Recipient") acknowledge that as a result of the engagement contemplated by this Agreement each Recipient may acquire knowledge of and may make use of certain information of the other party (a "Disclosing Party") which is of a special and unique nature which may include, but is not limited to, such information concerning the Disclosing Party's financial condition, prospects, technology, customers, clients, suppliers, sources of leads and methods of doing business and any other information disclosed to a Recipient or known by a Recipient as a consequence of or through the engagement contemplated hereby prior to or after the date hereof, and not generally known, about the Disclosing Party (collectively, the "Confidential Information"). Each Recipient agrees to keep in strict secrecy and confidence any and all Confidential Information of which the Recipient knows of or to which the Recipient has access that has not been publicly disclosed and is not a matter of common knowledge with respect to the Disclosing Party. Each Recipient shall not, without the Disclosing Party's prior written consent, disclose any such Confidential Information to any third person or entity. The terms and conditions of this Agreement shall be deemed Confidential Information.

#### **Indemnity.**

Each party (an "Indemnifying Party") shall indemnify and hold the other party (an "Indemnified Party") harmless for any loss, cost or expense, including reasonable attorney's fees, costs of investigation and court costs, for any material breach of this Agreement. A breach of this Agreement by an Indemnifying Party shall not affect, reduce or terminate the Indemnified Party's obligations hereunder until finally determined by a court of competent jurisdiction or arbitration, as the case may be. Each party shall give the other party prompt notice of any claim, demand, or action arising under the provisions of any indemnity, and the Indemnifying Party shall, if the Indemnified Party so requests, assume the defense of any claim, demand, or action for which indemnity is provided, but



the Indemnifying Party shall, upon the Indemnified Party's request, allow the Indemnified Party to cooperate in the defense thereof at the Indemnified Party's own expense.

#### **Client's Property.**

Any property of the Client placed in the Company's custody for performance of this Agreement shall not be covered by insurance, and no risk is assumed by the Company in the event of loss or damage to such property by fire, water, burglary, theft, civil disorder, or any accident beyond the reasonable control of the Company.

#### **Entire Agreement; Modification.**

This Agreement contains the entire agreement and understanding between the parties and supersedes any and all prior agreements and understandings relating to the subject matter hereof, and may not be amended, supplemented, renewed, extended, altered, or discharged except expressly by an instrument in writing signed by all of the parties hereto.

#### **Assignment.**

Neither party shall have the right to assign or delegate its rights or obligations hereunder, or any portion thereof, to any other person.

#### **Waiver.**

The waiver by either party hereto of a breach or violation of any term or provision of this Agreement shall not operate nor be construed as a waiver of any subsequent breach or violation.

#### **Severability.**

The invalidity of any one or more of the words, phrases, sentences, clauses or sections contained in this Agreement shall not affect the enforceability of the remaining portions of this Agreement or any part thereof, and, in the event that any one or more of the words, phrases, sentences, clauses or sections contained in this Agreement shall be declared invalid, this Agreement shall be construed as if such invalid word or words, phrase or phrases, sentence or sentences, clause or clauses, or section or sections had not been inserted.

#### **Headings.**

The headings appearing in this Agreement are inserted only as a matter of convenience and in no way define, limit, construe or describe the scope or extent of such section or in any way affect such paragraph.

#### **Disputes.**

In the event of any dispute between the parties to this Agreement arising out of or relating to this Agreement (including the applicability of this provision), venue shall be in a court of competent jurisdiction in Miami-Dade County, Florida. The prevailing party in any such litigation shall be entitled to an award of all attorneys' fees and related costs incurred. In the event either party commits a continuing breach of this Agreement, the non-breaching party may seek injunctive relief from a court of competent jurisdiction, without the necessity of proving monetary damages.

#### **Further Assurances.**

Each party shall, at any time and from time to time after execution of this Agreement, upon request of the other party, do, execute, acknowledge and deliver all such further acts, instruments and assurances as may be necessary or expedient to carry out this Agreement's intended purposes.

#### **Notice.**

Any notice to be given by any of the parties hereto may be effected either by personal delivery in writing, or by mail, federal express or other similar overnight service, certified or registered and postage prepaid, with return receipt requested, and addressed to the addresses listed in the first paragraph of this Agreement. Notice shall be deemed to be given: (a) if personally delivered, when delivered; (b) if mailed, when receipted or refused in the U.S. Mail, and (c) if delivered to Federal Express, or any other nationally recognized overnight carrier and next business day delivery is requested, one business day after delivery to such overnight carrier. Each party, by similar written notice given five days in advance to the other party, may change the address to which notice may be sent.

### **Counterparts.**

This Agreement may be executed in one or more counterparts, all of which taken together shall constitute a single instrument and agreement.

### **Governing Law.**

This Agreement shall be construed and enforced in accordance with the laws of the State of Florida without regard to its choice of law provisions.

### **Limitation of Liability.**

The Company's liability shall in no event exceed the contract price set forth herein. UNDER NO CIRCUMSTANCES AND UNDER NO LEGAL THEORY, WHETHER TORT (INCLUDING NEGLIGENCE), PRODUCT LIABILITY, CONTRACT, OR OTHERWISE, SHALL THE COMPANY BE LIABLE TO THE CLIENT OR ANY OTHER PERSON FOR ANY LOSS OF, OR DAMAGE TO, THE CLIENT FOR LOSS OF PROFIT OR SAVINGS, OR FOR ANY INDIRECT, SPECIAL, INCIDENTAL, PUNITIVE, RELIANCE OR CONSEQUENTIAL DAMAGES, EVEN IF THE COMPANY SHALL HAVE BEEN INFORMED OF THE POSSIBILITY OF SUCH DAMAGES. Without limiting the generality of the foregoing, the Client specifically disclaims any liability for penalties (including administrative penalties), special or punitive damages, damages for lost profits or revenues, loss of use of products or any associated equipment, cost of capital, facilities, or services, downtime, shut-down, or slow down costs, spoilage of material, or for any other types of economic loss.

### **Consent to Disclosure**

Federal law requires this consent form be provided to you. Unless authorized by law, we cannot disclose your tax return information to third parties for purposes other than the preparation and filing of your tax return without your consent. If you consent to the disclosure of your tax return information, Federal law may not protect your tax return information from further use or distribution.

You are not required to complete this engagement to engage our tax return preparation services. If we obtain your signature on this engagement by conditioning our tax return preparation services on your consent, your consent will not be valid. If you agree to the disclosure of your tax return information, your consent is valid for the amount of time that you specify. If you do not specify the duration of your consent, your consent is valid for one year from the date of signature.

I authorize Greenlight Financial LLC to disclose my tax return information to Meru Accounting, located at 603 E Fort King St, Ocala, Florida 34471, for any and all related tax preparation and financial services, with this consent remaining valid indefinitely unless I provide written cancellation.

If you believe your tax return information has been disclosed or used improperly in a manner unauthorized by law or without your permission, you may contact the Treasury Inspector General for Tax Administration (TIGTA) by telephone at 1-800-366-4484, or by email at [complaints@tigta.treas.gov](mailto:complaints@tigta.treas.gov).

### **Accounting Software.**

Company may upgrade Client's current accounting software to QuickBooks Enterprise or any comparable software, at the discretion of the Company. If, for any reason, This Agreement is terminated, Client will be solely responsible for the purchase of their own stand-alone accounting software/license.

**Communication Consent**

**By signing this agreement, you grant permission for Greenlight Financial to contact you via phone, email, or text messages, potentially automated, regarding the services we offer and other communications. You acknowledge that you have read and understood our Privacy Statement. Your agreement is voluntary and not a requirement for any engagement of services.**



# Agreement Summary

Sender	Greenlight Financial
Sent Date	Thursday, January 8, 2026 3:12 PM
Recipient	Inteli-K
Effective Start Date	January 8, 2026
Payment Authority	None
Payment Method	None
Document ID	prop_nfqdtetdykavqasmua
Status	Accepted
Accepted At	Thursday, January 8, 2026 3:13 PM

Signatory	Argenis Lopez
Signed	Test
Time	Thursday, January 8, 2026 3:13 PM
IP Address	189.203.106.218