

The Consonance Group

SERVICES AND SOLUTIONS MENU

Don't go it alone. Let the Consonance Group handle your finances and human resources so you can focus on your mission.

About Us

The Consonance Group (TCG) provides bookkeeping, human resources, and financial management services to a wide range of nonprofit and small for-profit businesses. By engaging TCG as a trusted partner, businesses are able to focus on their mission while we manage your finances and human resources. We provide the expertise, consistency, and accuracy needed for vital operational aspects of any organization.

Our Approach

At the Consonance Group, we believe in a collaborative and client-centric approach. We understand that every organization has unique needs and goals, especially in the small business and nonprofit arenas. We're not just another HR and bookkeeping vendor. We strive to be a trusted partner, providing strategic guidance and expertise to help you achieve your business objectives. As we come alongside your company and learn more about your goals and aspirations, we are proactive and responsive in solving your finance, human resources, and operational needs.

OUR LEADERSHIP TEAM



Jonathan Morris
Chief Executive Officer



Adria Cooper
Chief Operating Officer
MBA, CNP, SHRM-CP



Imran Babayev
Chief Financial Officer
MBA, CPA, CGMA

SERVICES

Bookkeeping & Financial Services

- Accounts Payable & Receivable Management
- Bank and Card Reconciliation
- Financial Reporting
- Chart of Accounts Setup & Maintenance
- Month end and year end closing
- Audit Preparation Assistance
- Classifying Restricted Grant Expenses
- Custom Financial Reporting

Human Resources

- Benefits Administration
- Recruitment & Onboarding
- Employee Training & Development
- Performance Management
- Employee Relations
- Policy Development

Payroll Administration

Fractional CFO

- Budgeting and Forecasting
- Financial Reports for Nonprofit Boards
- Financial Operations Advising

Focus on What Matters Most and Let Us Handle Your Back Office

Core Values



INTEGRITY

We are ethical, honest, dependable, valued, and a trusted partner for all of our clients.



INSIGHT

We are able to see through noise and confusion to get to the heart of the matter; able to identify the smartest solutions to complex problems and simplify procedures.



GENEROSITY

We listen with openness, are in service to others, and practice compassion and kindness.



GRATTITUDE

We always appreciate the opportunity to serve our clients, our company, the people we work with, and the relationships we build.



COURAGE

We speak up and show up when needed; being willing to work through uncomfortable situations and engage in difficult conversations.

We understand that as a business owner or organization leader, your time is valuable. You shouldn't be bogged down by the burden of bookkeeping and HR management tasks, especially when those aren't your areas of expertise.

Outsourcing to a trusted partner can bring you peace of mind and free you up to spend more time on your mission and less time in administrative monotony. We provide the expertise, consistency, and accuracy needed for vital financial and operational functions of your organization.

We aren't just here to check a box and get tasks done. We are your partner in the growth and success of your organization. We support you in solving complex issues, furthering your mission and reaching beyond the typical consultant-client relationships to make a lasting impact.

We support organizations in aligning *people*, *numbers*, and *mission*.

Bookkeeping Services

Financial operations from bookkeeping and payroll to CFO roles can easily be delegated to our team for efficient, accurate, timely, and cost-effective performance. We specialize in keeping nonprofit and small business books organized, up to date, and, most importantly, useful for management.

Silver Plan | *Basic Bookkeeping Services*

ACCOUNTS PAYABLE & RECEIVABLE MANAGEMENT

We handle the processing of all the day-to-day income and expense transactions. Our Quickbooks Pro Advisor-certified bookkeeping team posts all entries to your accounting system, maintains connections with your bank and credit card accounts, and can implement paperless systems to handle bill payments and credit card receipts.

BANK & CREDIT CARD RECONCILIATION

Monthly account reconciliations will be performed for all banking and credit card accounts. Loan amortization entries will be posted as needed. Reconciliation reports are archived within Quickbooks, and PDF statements will be retained by TCG so they can easily be provided to your CPA at year-end.

OTHER BOOKKEEPING ASSISTANCE

TCG will post payroll entries to the accounting system, and make salary allocation entries as needed. TCG can handle sales taxes for your organization and can act as the liaison between your organization and your auditors to assure a smooth and painless annual audit experience. We will work closely with you and your tax preparer so you can be confident that your 990 makes a good impression for potential donors or any other public inspection.

BASIC FINANCIAL REPORTING

After closing each monthly accounting period, standard financial statements are prepared. Management will have timely and accurate financial data you need for informed decision making,

Gold Plan | *Advanced Bookkeeping Services*

Includes all of the above, plus...

ONE-ON-ONE MEETINGS

Two monthly, 30 minute one-on-one meetings to ensure open and continuous communication between you and our finance manager.

PERIODIC RELEASE OF TEMPORARILY RESTRICTED ASSETS

Conduct monthly or quarterly releases of temporarily restricted assets based on your organization's activities and needs.

FINANCIAL STATEMENT UPDATES

Reflect Temporarily Restricted Assets releases in the Statement of Financial Activities and the Statement of Financial Position according to your organizational needs.

CLASSIFYING RESTRICTED GRANT EXPENSES

Accurately classify and record expenses related to restricted grants in the general ledger.

Platinum Plan | *Financial Operations Services*

Includes all of the above, plus four hours to use towards HR or CFO services, and...

RELIABLE FINANCIAL REPORTING

Our approach enables the generation of accurate year-to-date (YTD) budget vs. actual reports and annual budget vs. actuals and cash flow reporting.

ONE-ON-ONE MEETINGS

Weekly, 30 minute one-on-one meetings to ensure open and continuous communication between you and our finance manager.

CUSTOM BUDGET SOLUTION

We create a tailored budget format and corresponding accounting processes that align with your organization's needs, ensuring seamless integration between budgeting and financial reporting. The service also includes one six-month budget revision during the fiscal year to ensure ongoing alignment with your financial goals.

Fractional CFO Services

For organizations without a Chief Financial Officer, TCG provides expertise and service scaled to fit smaller businesses, where a full-time in-house position is not required. Our CFO can work with you to prepare budget projections or assist with complex modeling and forecasting, and help you implement best practices to insure financial health and oversight.

Financial Expertise Right-Sized for You

Allow us to bring our extensive experience and knowledge in financial strategy, budgeting, forecasting, cash flow management, and risk assessment to your organization. Our fractional CFO services include:

UNDERSTANDING YOUR BUSINESS NEEDS

We gain a deep understanding of your organization's specific requirements to design effective financial reporting and meaningful Key Performance Indicators (KPIs) or financial dashboard indicators, providing a comprehensive view of your performance.

BUDGET PROJECTIONS AND FORECASTING

We assist in preparing budget projections, complex modeling, and forecasting, while implementing best practices to ensure financial health and oversight. We also recommend adjustments to accounting and operational policies to align with your organizational goals.

CUSTOMIZED FINANCIAL PRESENTATIONS

Our service includes crafting customized presentations that tell the financial story of your organization through graphs and highlighted details. These presentations are tailored for finance committees and board members, clearly differentiating day-to-day management from board stewardship and oversight responsibilities.

CASH FLOW PROJECTIONS AND FORECAST

We provide cash flow projections for future reporting periods, offering valuable insights into your projected liquidity position and enabling timely corrective actions. Additionally, we forecast year-end results based on burn rates and conduct scenario planning and "what if" analyses.

Client Success Stories



Jonathan began as their part-time freelance bookkeeper. Now, the Consonance Group is the entire finance department, and they have added Human Resources and CFO services.



The Consonance Group has been a trusted partner for 826DC for over a decade, now we've also taken on two sister chapters and the national parent org.

Human Resources Services

We offer comprehensive outsourced Human Resources Services, with over 25 years of staff experience. Our customized and scalable solution is tailored to meet the specific needs of your organization. For your small business or nonprofit, we can take care of your HR management needs, allowing you to focus on your core mission and strategic goals.

Empower Your People, Achieve Your Goals

We pride ourselves on being a strategic partner to our clients, working closely with your leadership team to develop and implement HR policies and programs that align with your business goals and support the growth of your company. With our expertise and support, you can focus on running your business, confident that your HR needs are being handled effectively and efficiently.

RECRUITMENT & ONBOARDING

Streamline your hiring process and help you attract top talent.

BENEFITS ADMINISTRATION

Ensure your employees have access to the best benefits packages tailored to your organization's priorities and budget.

EMPLOYEE TRAINING & DEVELOPMENT

Develop and implement training programs to enhance your workforce's skills.

POLICY DEVELOPMENT

Work closely with your leadership team to develop and implement HR policies and programs that align with your company goals.

EMPLOYEE RELATIONS

Provide guidance and support for employee concerns and conflicts.

PERFORMANCE MANAGEMENT

Create a system for fair and effective performance evaluations.

Payroll Administration

TCG can serve as payroll administrator with your existing payroll service provider or we can help you migrate to one that we recommend. Transfers for salary deferral and employer contributions to your retirement plan can be made by TCG. We will perform quarterly reconciliations between your IRS form 941 and General Ledger.



Pricing & Packages

Financial Services Packages

Features:	Silver \$2,035 For companies averaging 500 transactions/month or fewer	Gold \$4,120 For companies averaging 1500 transactions/month or fewer	Platinum \$5,520 <i>Includes up to 4 hours/month of HR and CFO services!</i>
Accounts Payable & Receivable	X	X	X
Bank & Card Reconciliations	X	X	X
Audit Facilitation	X	X	X
Sales Tax Filing	X	X	X
Basic Financial Reporting	X	X	X
Standing Meetings		X	X
Restricted Grants Classifications		X	X
Custom Financial Reporting			X
Budgeting & Forecasting			X

Payroll Administration Packages

Up to 20 Employees	21 to 50 Employees	Over 50 Employees
\$375 / month	\$500/ month	\$700/ month

Human Resources & CFO Packages

Hourly	Up to 5 Hours/Month	Up to 10 Hours/Month	Up to 20 Hours/Month
\$200/ hour	\$900/ month	\$1700/ month	\$3200/ month