

Best Value

# STARTER \$350

Freelancers & Micro-businesses

# of Transactions	Up to 50
# of Banks & Credit Cards	2 & 2
QuickBooks Subscription & Setup	✓
Transaction Categorization	✓
Monthly Reconciliations	✓
Monthly P&L & Balance Sheet	✓
Monthly Sales Tax Report	
A/R Invoicing, Tracking, & Aging	
A/R Customer Statements & Follow-Up	
Year-End Reports for CPA/Tax Preparer	
1099 Prep & Vendor Management	
Financial Review Report	Year-End
Support Level	Email

# GROWTH \$750

Product & Service Businesses

## Everything in STARTER

# of Transactions	Up to 150
# of Banks & Credit Cards	3 & 3
QuickBooks Subscription & Setup	✓
Transaction Categorization	✓
Monthly Reconciliations	✓
Monthly P&L & Balance Sheet	✓
Monthly Sales Tax Report	✓
A/R Invoicing, Tracking, & Aging	✓
A/R Customer Statements & Follow-Up	
Year-End Reports for CPA/Tax Preparer	
1099 Prep & Vendor Management	10
Financial Review Report	Quarterly
Support Level	Email & Slack

# PREMIUM \$1,500

High-Volume & Complex Businesses

## Everything in GROWTH

# of Transactions	Up to 300
# of Banks & Credit Cards	4 & 4
QuickBooks Subscription & Setup	✓
Transaction Categorization	✓
Monthly Reconciliations	✓
Monthly P&L & Balance Sheet	✓
Monthly Sales Tax Report	✓
A/R Invoicing, Tracking, & Aging	✓
A/R Customer Statements & Follow-Up	✓
Year-End Reports for CPA/Tax Preparer	✓
1099 Prep & Vendor Management	25
Financial Review Report	Monthly
Support Level	Priority Email & Slack

Services delivered via email or Slack by a Certified Public Bookkeeper & QBO ProAdvisor | Transaction overages: \$2/transaction with notification at 80% of limit.



# ★ KICKSTART PROGRAM ★

## \$250

Side-Hustles & First-Year Businesses

### 6-Month Beginner Program

Professional bookkeeping basics for businesses in their first year. **Limited to 5 clients.**

**After 6 months:** Automatic graduation to Starter tier (\$350/month) with expanded services and capacity.

#### Included Services

# of Transactions	Up to 30
# of Banks & Credit Cards	1 & 1
QuickBooks Subscription & Setup	✓
Transaction Categorization	✓
Monthly Reconciliations	✓
Monthly Profit & Loss Statement	✓
Progress Report	End of Month 3 & 6
Support Level	Email

Kickstart is designed for up to 30 transactions per month. Occasional overages are expected as you grow. Consistent overages indicate you are ready to graduate to Starter tier (\$350/month).



**FIDA  
FINANCIALS**