

Outsourced Accounting and Advisory:

What's Included In Each Service



Services	Outsourced Accounting Essentials	Business Process Outsourcing	Fractional Controller	Fractional CFO
Accounting Transaction Recording	✓	✓	✓	✓
Month-End Journal Entries	✓	✓	✓	✓
Bank, Credit Card, Investment Account Reconciliations	✓	✓	✓	✓
Internal Financial Reporting	✓	✓	✓	✓
Fixed Assets Management and Depreciation	✓	✓	✓	✓
1099 and 1096 Filings	✓	✓	✓	✓
Retained Earnings Reconciliation	✓	✓	✓	✓
Recording Payroll Expense and Liability	✓	✓	✓	✓
Cash Basis Balance Sheet, Profit & Loss	✓	✓	✓	✓
Cash or Accrual Basis Balance Sheet, Profit & Loss		✓	✓	✓
Automated Accounts Payable		✓	✓	✓
Invoicing and Accounts Receivable		✓	✓	✓
Sales and Use Tax Returns		✓	✓	✓
Inventory Tracking		✓	✓	✓
Payroll Processing		✓	✓	✓
Oversight of Accounting Operations and Internal Controls			✓	✓
KPI Tracking and Financial Ratios Reporting			✓	✓
Industry Benchmarking Reporting			✓	✓
Budget vs Actual Variance Analysis and Insights			✓	✓
Financial Assessment and Implementation of Best Practices			✓	✓
Customized Financial and Performance Reports			✓	✓
Cash Flow Management			✓	✓
Quarterly Business Review Meetings			✓	✓
Planning, Forecasting, and Budgeting				✓
Board/Investor Reporting and Presentations				✓
Capital Planning and Funding Strategies				✓
Profitability Analysis and Pricing Insights				✓
Financial Strategy for M&A, Expansion or Restructuring				✓

Need something more,
or just not sure which
service is for you?

We offer a range of optional add-on services that can be combined with any package to create a custom-fit solution. Or give us a call and we'll walk you through all our options, and answer any questions.

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