

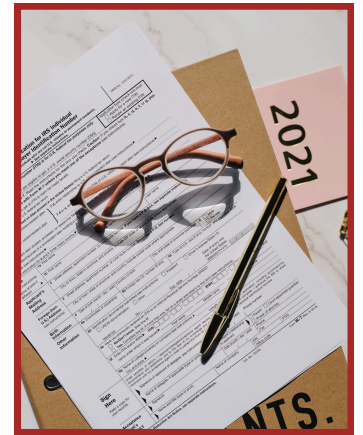
The Spale Agency

Bookkeeping Pricing Guide



Level up
your
books for your business

This is a breakdown of bookkeeping packages to bring financial clarity to your business.



Who you're working with.



At **The Spale Agency**, I provide clarity, accessibility, and trusted guidance to help clients manage their financial records with confidence. I am dedicated to adding value through personalized bookkeeping solutions that **ensure your financial data is accurate, organized, and easy to understand**. Let's build a partnership grounded in transparency and support, empowering you to make informed decisions and achieve your long-term business goals.

Scope of work.



Bookkeeping services

I offer accurate and organized financial record-keeping tailored to your business needs. Our bookkeeping services help you **maintain clear financial data, making tax time easier and providing insights to support informed decision-making**. By

ensuring your records are up-to-date and precise, we enable you to focus on growing your business with confidence. I don't just keep your books organized—I help you understand what your numbers are telling you.

If your books feel overwhelming, behind, or confusing—**you're not alone**. This is exactly what I help fix.

Who I help:

- Service-based business owners
- Small business owners are overwhelmed by their books
- Entrepreneurs who want clarity in their numbers

Initial consultation

To better understand your business and current financial setup, I offer a brief consultation for a **flat fee of \$25, payable upfront**. This allows me to assess your needs and provide tailored recommendations for moving forward.

Billing information

Bookkeeping service fees are **billed and invoiced regularly, typically on a monthly basis**.

Cleanup service fees, on the other hand, if applicable, are billed and invoiced once before the beginning of the project. To secure your project and cover initial costs, a **deposit of 25% of the fee is required upfront**. The remaining balance will be invoiced upon project completion.

This transparent approach ensures you know exactly when and how you will be charged for each service, as well as allows me to dedicate the necessary time and resources to your cleanup while providing transparency and protection for both parties.

**Please note: a detailed cancellation policy is available and will be provided in your service agreement.*

Getting started.



Before ongoing bookkeeping, some clients may need help getting set up.

If you're just starting or feel overwhelmed, I offer a **Business Setup Package** to help you get your website, systems, and financial foundation in place before moving into

ongoing bookkeeping.

👉 Ask me about setup options.

Package options.

My flexible bookkeeping packages are designed to meet your unique business needs and budget while providing the support you deserve. More importantly, **they're built to give you clarity**—helping you understand your numbers, stay organized, and clearly see where your money is going so you can confidently run and grow your business.

Discounted Fee Disclaimer & Offer




New client special: Receive a 20% discount on services when you sign up for ongoing bookkeeping packages for the first year. This offer is **valid for new clients only** and applies to cleanup fees quoted at the time of assessment. **After the first year, standard rates will apply.**

 Essential	 Strategic	 Comprehensive
Solo entrepreneurs with minimal transactions	Growing businesses with payroll needs	Complex or high-volume organizations
Includes: <ul style="list-style-type: none">✓ Basic bookkeeping✓ Bank reconciliations✓ Monthly financial reports	Includes: <ul style="list-style-type: none">✓ All Essential services✓ Payroll support✓ Detailed financial reporting	Includes: <ul style="list-style-type: none">✓ All previous services✓ Customized reporting✓ Tax prep support✓ Additional consulting
\$300–\$600/month	\$600–\$1,200/month	\$1,200–\$3,000+/month

Clean up services.

Cleanup services, if applicable, organize and correct your financial records, bringing them accurate and up-to-date. This ensures your books are ready for **ongoing bookkeeping, tax prep, and financial insights**—saving you time and reducing stress. Cleanup services are designed to get your books back on track—

clean, accurate, and fully up to date—so you can move forward with clarity, confidence, and reliable financial data.

 Basic	 Standard	 Advanced
Small businesses with minimal transactions and straightforward records	Growing businesses with moderate transactions and some disorganized records	Larger or highly complex books, multiple accounts, or long-back records
Includes: <ul style="list-style-type: none">✓ Organizing and reconciling bank and credit card statements✓ Correcting basic data entry errors✓ Bringing books up-to-date for the current year	Includes: <ul style="list-style-type: none">✓ All Basic services✓ Identifying and correcting discrepancies✓ Categorizing past transactions✓ Preparing financial statements for review	Includes: <ul style="list-style-type: none">✓ All Standard services✓ Detailed reconciliation of multiple years✓ Customized reports and recommendations✓ Final cleanup for seamless ongoing bookkeeping
\$300–\$500	\$500–\$1,000	\$1,000–\$3,000+

A few important notes.



Payment Methods

Payments will be billed and invoiced through **QuickBooks**. You can conveniently pay your invoices using a **debit card, a credit card, or an ACH transfer**.

An **automatic billing setup can be arranged**, allowing you to select a preferred date for funds to be withdrawn from your card or account. If you choose this option, payments will be automatically processed on your selected date, ensuring timely payments.

If you prefer to receive an invoice instead, I will send it to you, and **it must be paid within 30 days of receipt**. Please note that late fees may apply to overdue balances, and prompt payment helps us continue providing seamless service.

Payment notices & reminders

To help ensure timely payments, clients will receive **automated notices about upcoming due dates**. These reminders are designed to keep you informed and help avoid late fees or service interruptions.

If you need a payment plan or experience any difficulties, please do not hesitate to reach out—I am happy to discuss flexible options and work with you to find a solution. Prompt communication is appreciated, and late payment interest may be waived if you contact us in advance to discuss your situation.

Referral Program

I value your trust and appreciate referrals! When your referral becomes a client, you'll be rewarded with exciting incentives such as **gift cards, cash prizes, apparel, and more**. The more friends or colleagues you refer who sign up for our services, the greater your rewards! Contact me for details on the referral rewards program.

Discounts for Eligible Groups

I believe in supporting our community and offering accessible services to those who serve and have served. I am pleased to provide a **20% ongoing discount** on our standard rates for bookkeeping and cleanup services to the following groups:

 **Healthcare Professionals**

 **Educators**

 **Active and Former Law Enforcement & First Responders**

 **Active & Former Military**

 **Individuals with Disabilities**

 **Low-Income Clients**

Eligible clients will be asked to provide proof of eligibility.

Privacy

All client information and financial data provided will be **kept strictly confidential** and used solely for the purpose of delivering bookkeeping services. No data will be shared with third parties without prior consent, unless required by law.

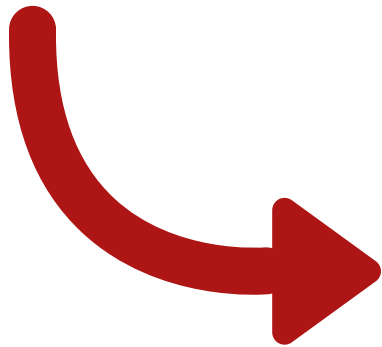
Disclaimer

Bookkeeping services are designed to organize and maintain your financial records. As a licensed tax preparer, I can offer tax-related guidance and consulting; however, the bookkeeping services do not constitute legal, tax, or accounting advice. Clients are **encouraged to consult with other licensed tax professionals or me for specific legal, tax, or financial issues.**

Booking your consultation.



Ready to get your books organized and finally understand your numbers? Schedule your consultation and let's get your business back on track by visiting my **website or by scanning the QR code below:**



Contact details.



If you have any **questions, need further assistance, or would like to discuss your specific bookkeeping needs**, please don't hesitate to reach out. I look forward to supporting your business and helping you achieve your financial goals!



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