

MONTHLY BOOKKEEPING PACKAGE

Bookkeeping Basic

The Foundation for Stress-Free Finances

\$350

per month

Save 10% with a 12-month agreement.

Accurate, tax-ready books, without paying for more than you need.

Every month, your transactions are recorded, your accounts are reconciled and your financial statements are ready. Every two months, we sit down together and walk through your results.

Who It's For

- Very small businesses and solo owners with simple finances.
- Up to 2 bank or credit card accounts and about 75 transactions a month.
- Owners who want accurate, tax-ready books without paying for more than they need.

Questions Basic Helps You Answer

- “ *Am I actually making money?* ”
- “ *Where did my money go this month?* ”
- “ *Will my books be ready when my tax preparer asks?* ”

What's Included

- ✓ **Monthly Transaction Recording** – Every sale, expense and payment accurately recorded.
- ✓ **Bank and Credit Card Reconciliations** – Your books match your statements.
- ✓ **Monthly Financial Statements** – Profit and Loss and Balance Sheet.
- ✓ **QuickBooks Online Subscription** – Included.
- ✓ **Business Review Every Two Months** – We walk through your results together.
- ✓ **Year-End Package** – Tax-ready books, year-end reports and support for your tax preparer.
- ✓ **Weekday Support** – Monday through Friday, from someone who knows your books.

Why It Matters

When your books are in order, you can:

- See exactly where your money is going.
- Plan for taxes without last-minute stress.
- Avoid costly mistakes.

Who Handles Your Books

You work directly with Lorelei Hughes, founder of Claritas. The same person who records your books leads your reviews.

Upgrade When You're Ready

If your business grows past 2 accounts or 75 transactions a month for two months in a row, we'll move you up to Bookkeeping Core, with no disruption to your books.

Good to know – Add-ons available: Payroll Processing, W-2 Filing, 1099 Filing and Sales Tax Filing. With a 12-month agreement, you save 10% and QuickBooks Setup (\$150) is free. We don't prepare or file tax returns.

Questions about your quote?

Call or email anytime. You'll hear back from Lorelei directly.

(336) 596-4920

lhughes@claritasfinesolutions.com