

MONTHLY BOOKKEEPING PACKAGE

Bookkeeping Plus

Advanced Bookkeeping for Growing Businesses

\$1,399

per month

Save 10% with a 12-month agreement.

Core helps you run the business. Plus helps you plan its next move.

Who It's For

- Businesses with increasing transaction volume.
- Owners who want more detailed financial insights.
- Companies preparing for expansion, funding or hiring.

Questions Plus Helps You Answer

- “ Are we on budget this month? If not, why?”
- “ Which products or services make the most money?”
- “ Can we afford to expand, hire or take on funding?”

What's Included

Everything in Bookkeeping Core, plus:

- ✓ **Higher Volume** – Up to 5 bank or credit card accounts and 300 transactions a month.
- ✓ **Cash or Accrual Accounting** – Including accrual and adjustment journal entries.
- ✓ **Annual Budget** – Built with our standard template, with monthly budget-to-actual reporting.
- ✓ **KPI Dashboard** – 1 custom dashboard for your key metrics and trends.
- ✓ **Custom QuickBooks Report** – 1 per year, built around your business.
- ✓ **Year-End CPA Meeting** – We meet with you and your CPA or tax preparer to review your year-end results.
- ✓ **Weekday Support** – Monday through Friday, from someone who knows your books.

Why Upgrade?

Plus isn't just about clean books. It helps you:

- Plan for growth with a budget you can measure against.
- Identify your most profitable products or services.
- Avoid cash flow surprises.

Who Handles Your Books

You work directly with Lorelei Hughes, founder of Claritas, from your monthly books to your year-end CPA meeting.

Seamless Transition

Already on Bookkeeping Core? Upgrading is simple. We'll keep all your existing data and add the new features without any disruption.

Good to know – Higher volume? Add \$200 per 100 transactions and \$75 per account. Save 10% and get QuickBooks Setup (\$150) free with a 12-month agreement. Add-ons available. We don't prepare or file tax returns.

Questions about your quote?

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

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