

ADVISORY SERVICE

Custom Reporting

Answers to the Questions You Actually Ask

\$450

per project, starting at

Final price confirmed after a quick conversation.

Getting reports but no answers?

Standard reports show what happened. Custom reports answer your specific questions, built and saved in your QuickBooks so you can run them anytime.

Who It's For

- Owners who need answers the standard reports don't give.
- Businesses that track jobs, projects, locations or product lines.
- Anyone preparing for a meeting with a lender, investor or partner.

Questions This Helps You Answer

- “ Which jobs or locations are most profitable?
- “ What should I bring to my lender meeting?
- “ How does this year compare to last, month by month?

What's Included

- ✓ **Discovery Conversation** – We learn which questions you need answered and how often.
- ✓ **Custom QuickBooks Reports** – Built and saved in your QuickBooks, so you can run them anytime.
- ✓ **Walk-Through** – We show you how to read and use each report.
- ✓ **Adjustments** – Reports are updated as your business and questions change.

Why It Matters

The right report saves time and leads to better decisions. Instead of exporting data and building spreadsheets, you get answers you can trust, right when you need them.

Good to Know

Bookkeeping Plus includes 1 custom QuickBooks report per year. Additional custom reports are available as an advisory service.

Pricing – Starting at \$450 per project. We'll confirm your price after a quick conversation about the questions you need answered.

Questions about your quote?

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

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