

## **PACKAGES**

## **START**

For the entrepreneur who just wants to get their financials together. It includes semi-annual review meetings and ensures your books are complete & correct.

## **GROW**

For the entrepreneur who wants to use their numbers. We'll hone in on the financial metric that can move the needle, giving you clarity for growth.

- Document Management
- Goal Identification & Tracking
  Quarterly Strategy Calls
- Monthly Video Summary

## **MASTER**

For the entrepreneur who wants to thoroughly learn their business's numbers. We'll work on all of the important topics, enabling you to master your finances.

- Document Management
- Custom Income Entries
- Project Tracking
- Custom Reporting

- Forecasting
- Profit Planning
- Goal Identification & Tracking
- Monthly Strategy Calls

\*All packages include core services and are customizable.