

PACKAGE SELECTION WORKSHEET

This easy-to-use worksheet is designed to help you review and determine your bookkeeping needs. Start by printing the worksheet and reviewing the list of services. Check off the items that best fit your needs. Once you're done, you'll be able to clearly see which of our packages works best for you – or if a custom tailored solution is the better fit.

To discuss your analysis results, call Terri at **647-289-2512** or Connie at **519-939-9808** to book a meeting. Don't forget to bring your Package Selection Worksheet!

CHECKLIST	PREMIUM	ESSENTIALS	BASIC	LITE
<input type="checkbox"/> Subscription to Quickbooks Online Plus and Hubdoc Included	✓	✓	✓	✓
<input type="checkbox"/> Processing of receipts, expenses, bills, invoices and payments, up to ___ transactions	250	150	100	50
<input type="checkbox"/> Ensure the accuracy of your bookkeeping records by completing reconciliations of ___ accounts	5	4	3	2
<input type="checkbox"/> Get insights into your business with Quickbooks Reporting	Enhanced Reports	Monthly Reports	Learn to DIY	Learn to DIY
<input type="checkbox"/> Quickbooks Training Included	Advanced	Enhanced	Basic	Basic
<input type="checkbox"/> Feel more in control with access to your books anytime from anywhere there is internet using multiple devices allowing you to stay in constant touch with your business finances.	✓	✓	✓	✓
<input type="checkbox"/> Access to your bookkeeper for questions and support, Monday to Friday - 9am to 5pm	ANYTIME	✓	✓	✓
<input type="checkbox"/> Complete your annual or quarterly HST Return and file with CRA on your behalf - if needed	✓	✓	✓	
<input type="checkbox"/> Completion of Year End Reporting for your Accountant or Tax Preparer	✓	✓		
<input type="checkbox"/> Completion of Year End Closing Entries	✓	✓		
<input type="checkbox"/> Leverage Financly's 30+ years experience for strategic business development insights and guidance	✓	✓		
<input type="checkbox"/> Work directly with your Accountant to customize your books and processing for tax advantages and planning	✓			
<input type="checkbox"/> Get greater insights into your business with creation of Customized Reports to meet your individual business needs.	✓			
<input type="checkbox"/> Assistance to create and maintain a business budget to allow for better planning & growth	✓			
<input type="checkbox"/> Never miss a payment due date with our Account Payable monitoring and payment solution	✓			
<input type="checkbox"/> Completion of Year End Financial Reports and Closing Entries	✓			
<input type="checkbox"/> Stay on top of your Accounts Receivables with our A/R Follow up system	✓			

ADD ONS

LITE	BASIC	ESSENTIALS	PREMIUM
<input type="checkbox"/> Complete your annual or quarterly HST Return and file with CRA on your behalf	<input type="checkbox"/> Payroll Processing up to 10 employees	<input type="checkbox"/> Payroll Processing up to 10 employees	<input type="checkbox"/> Add Payroll Processing up to 10 Employees
<input type="checkbox"/> Purchase Addition number of monthly transactions	<input type="checkbox"/> Accounts Receivable follow up system	<input type="checkbox"/> Accounts Receivable follow up system	<input type="checkbox"/> Basic Inventory Set up and Control
<input type="checkbox"/> Purchase Addition accounts to be reconciled each month	<input type="checkbox"/> Basic Inventory Set up and Control	<input type="checkbox"/> Basic Inventory Set up and Control	<input type="checkbox"/> Purchase Addition number of monthly transactions
	<input type="checkbox"/> Purchase Addition number of monthly transactions	<input type="checkbox"/> Purchase Addition number of monthly transactions	<input type="checkbox"/> Purchase Addition accounts to be reconciled each month
	<input type="checkbox"/> Purchase Addition accounts to be reconciled each month	<input type="checkbox"/> Purchase Addition accounts to be reconciled each month	