

Reporting, compliance, reviews, audits and AUPs.

For businesses and organizations that need dependable financial reporting and verification. Every engagement begins with an initial engagement, so we can review your information and set the right scope before quoting ongoing work.

WHAT IS INCLUDED

-  **Financial reporting**
Statements and reports prepared for owners, lenders and boards.
-  **Compliance support**
Required filings and reports prepared and tracked.
-  **Reviews, audits and AUPs**
Scope and standards are confirmed in your engagement letter.
-  **Secure delivery**
Documents and deliverables exchanged in Connect.

HOW TO BEGIN

- A Priority start**
Pay the \$500 initial engagement fee and we begin right away, at our standard rates.
- B Scheduled start**
Prefer a later date? The same initial engagement secures your place, and we confirm a start date that fits both calendars.

Your engagement letter then confirms scope, responsibilities and fees.

WORKS WITH **Xero** | **Connect** | and more†

INITIAL ENGAGEMENT

\$500 to begin

Covers document review, scoping and onboarding.

The initial engagement fee is non-refundable and is separate from ongoing service fees, which are quoted by scope and complexity in your engagement letter.

†Third-party integrations are billed separately.



Scan to begin (\$500)