

**Small Business Virtual - CFO**

V - CFO PACKAGE LEVELS	ENTREPRENEUR	PROFESSIONAL	EXECUTIVE
	Sole Proprietor / Limited Liability Co.	2-10 Employees	2-10 Employees
	\$399.00	\$499.00	\$599.00
INCLUDED SERVICES			
<b>BOOKKEEPING</b>	x	x	x
<i>Month End Close &amp; Reconciliation Monthly Reporting</i>			
<b>TAX PREPARATION</b>	x	x	x
<i>Per Federal &amp; State Requirements</i>			
<b>ESTIMATED TAX PAYMENTS</b>	x	x	x
<i>IRS - Electronic Filing Tax Payment System</i>			
<b>SCHEDULED CFO MEETINGS</b>	Semi - Annual	Annual	Semi - Annual
<i>Strategic Review, Goals (fiscal and org), and Performance Coaching CFO meetings are conducted virtually or on location</i>			
<b>PERSONAL RETIREMENT PLANNING</b>	x		
<b>BUSINESS PLAN COACHING</b>	x	Optional	Optional
<i>Initial Plan Design &amp; Annual Review</i>			
<b>TAX RESOLUTION COUNSELING</b>	60 Minutes	60 Minutes	90 Minutes
<b>FULL SERVICE PAYROLL</b>	Optional	x	x
<b>FINANCIAL STATEMENTS</b>		x	x
<b>EXECUTIVE RETIREMENT PLANNING</b>		x	x
<i>High Comp &amp; Tax Strategies / Financial Planning / Exit Strategies</i>			
<b>12 MONTH FORECASTING</b>	Optional	x	x
<b>FRAUD ANALYSIS</b>	Optional	Optional	x
<b>EMPLOYEE RETIREMENT &amp; FINANCIAL COUNSELING</b>			x
<i>Retirement Plan Advice / Financial Coaching / Debt Counseling</i>			
<b>TAX PLANNING</b>	Optional	Optional	x

\*\* We offer a **Reserve V - CFO package** which is suitable for organizations requiring customized solutions and is priced according to specific need(s) and assessment results. This package maintains the highest level of organization adaptability.



**Onboarding Process:** Our team works hard to understand and get aligned with your existing processes. We're examining your past books, reading your business plan, and when applicable, building a forecasting model and set of KPIs. Additionally, we are reviewing your financial statements and chart of accounts to make sure we fully understand your needs and get off to a good start.



**Caveat:** *Because of the additional man hours required to properly onboard, our published fees do not reflect the additional costs associated with abnormal onboarding. However, we will always communicate to a mutual agreement before proceeding to ensure no surprise expenses, **GUARANTEED**.*

**Contact us now to claim a FREE 30 minute consultation**  
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<https://calendly.com/bowmantaxandfinancial> - Online Calendar

Service Disabled Veteran Owned Business