

# **FINANCIAL SERVICES & PRICING GUIDE**

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Mockingbird Management, LLC



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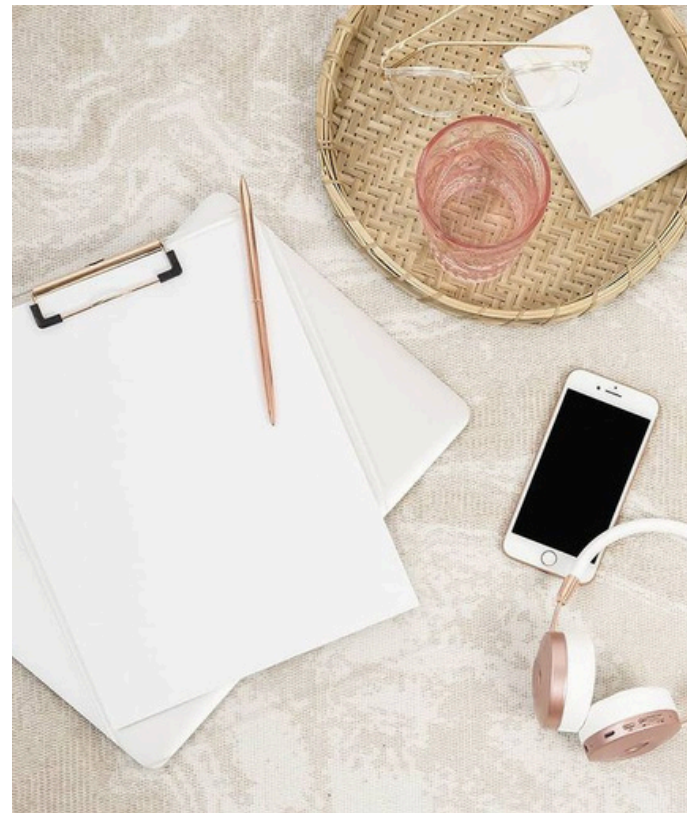


# Welcome!

At Mockingbird Management, The Mockingbird Team believes that managing your finances effectively is the cornerstone of business success.

In this guide, you'll find detailed information on our services, pricing, and how we can work together to ensure your financial success.

Together, we'll elevate your finances to new heights, unlocking the potential for success that your business deserves. Thank you for considering us as your trusted bookkeeping partner.



Subscribe to our email newsletter!

[LINK HERE](#)

# HELLO! I'M CANDICE



I'm a professional  
**VIRTUAL BOOKKEEPER**

I'm passionate about helping small business owners with their bookkeeping. Thank you for considering me as your partner in financial management.

My mission is to provide comprehensive, reliable, and personalized bookkeeping services that empower businesses to focus on their core activities while maintaining financial clarity and compliance.

Through our services, we aim to ensure accuracy in financial records, provide insightful financial reporting, and support strategic business decisions.

*connect with me*



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# PACKAGE DETAILS

All packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.

BRONZE PACKAGE \$425
<input type="checkbox"/> Monthly Bookkeeping -Up to 4 accounts
<input type="checkbox"/> Bank & Credit Card Reconciliation
<input type="checkbox"/> Financial Statements
<input type="checkbox"/> Quarterly Financial Review
<input type="checkbox"/> Dedicated Bookkeeper

GOLD PACKAGE \$900
<input type="checkbox"/> All services in the Package (BRONZE)
<input type="checkbox"/> Accounts Payable & Receivable Management
<input type="checkbox"/> Payroll Processing & Management
<input type="checkbox"/> Custom Financial Reporting
<input type="checkbox"/> Monthly Financial Review

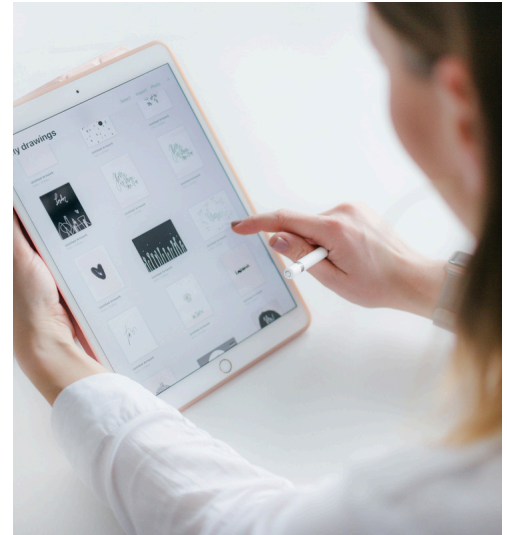
## Need more OR less support?

Both packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.

# SIGNATURE SERVICE

Choosing our Elite Financial Management Package means partnering with a team that is as invested in your business's success as you are.

You'll have everything you need to make informed financial decisions, optimize your operations, and accelerate your business growth.



## What you'll get:

- ✓ All services in the Package (A) & (B)
- ✓ Detailed analysis and forecasting of your cash flow, enabling proactive financial management and planning for future growth.
- ✓ Strategic financial advice and consulting, offering insights into financial planning, budgeting, risk management, and investment opportunities.
- ✓ Tax preparation services.

INVESTMENT  
STARTS AT **\$1250**



# SIGNATURE SERVICE

## THE DETAILS

Choosing our Elite Financial Management Package means partnering with a team that is as invested in your business's success as you are.

- This is perfect for you if

- ✓ You need deep insights into your financial health
- ✓ You need priority high touch client experience
- ✓ You need personalize tax strategic planning
- ✓ You need help navigating complex financial decisions.

- How It Works

With our comprehensive suite of services, expert advice, and personalized support, you'll have everything you need to make informed financial decisions, optimize your operations, and accelerate your business growth.

Elevate your financial management today with our Elite Package and focus on what you do best—running your business.

### Includes:

- Financial Analysis,
- Cash Flow Management,
- Budget & Risk Management,
- Priority Support
- Tax Preparation

INVESTMENT  
STARTS AT

**\$1250**

# PACKAGE OPTION

	<b>BRONZE</b> <b>\$425</b> <small>MONTHLY</small>	<b>DIAMOND</b> <b>\$1250</b> <small>MONTHLY</small>	<b>GOLD</b> <b>\$900</b> <small>MONTHLY</small>
Monthly Bookkeeping	✓	✓	✓
Bank Reconciliation	✓	✓	✓
Financial Review	✓	✓	✓
Financial Statement	✓	✓	✓
AR & AP Management	✗	✓	✓
Payroll Management	✗	✓	✓
Priority Support	✗	✓	✓
Financial Analysis	✗	✓	✗
Cash Flow Management	✗	✓	✗
Tax Prep	✗	✓	✗
	LEARN MORE	LEARN MORE	LEARN MORE

All packages are customizable based on your specific business needs, and additional services can be added for a tailored bookkeeping solution.



# ADD ONS

## Software Setup and Training - \$60/hr

Assistance with the selection, setup, and training for bookkeeping and financial software

### Includes:

- *Software Set up*
- *Software Training*
- *Software Coaching*
- *Software Optimization*
- *Charged Hourly*

[LEARN MORE](#)

## Fixed Asset Management - \$350

Tracking and management of fixed assets, including depreciation schedules and end-of-year tax adjustments.

### Includes:

- *Fixed Assets Tracking*
- *Fixed Assets Management*
- *Depreciation Schedules*
- *Amortization Schedules*
- *End-of-Year Adjustments*

[LEARN MORE](#)

## Accounts Cleanup and Catch-up - Call for Quote

A one-time service to update and correct bookkeeping records. Ideal for businesses that need to get their books up to date.

### Includes:

- *Comprehensive Review*
- *Categorization*
- *Reconciliation*
- *Adjustment Entries*
- *Financial Statements*
- *One-time Service*

[LEARN MORE](#)

To enhance the value and comprehensiveness of our bookkeeping packages, consider the following add-on services. These options allow you to customize the packages based on your specific needs, providing a more tailored and flexible approach.

# ADDITIONAL SERVICE

These options allow you to customize the packages based on your specific needs, providing a more tailored and flexible approach.

Year-End Bookkeeping	\$1,400.00	Enter all transactions for the entire year, reconcile all bank and credit cards accounts, make all general journal entries, provide reports needed for tax preparer.
Year-End Bookkeeping - Additional Accounts	\$150.00	Each additional bank or credit card account.
Bank Reconciliation	\$125.00	Monthly Reconciliation, Per Account
Sales Tax	\$250.00	Prepare & File Online
QuickBooks or Bookkeeping Cleanup	\$40 per hour	
Payroll Reports Only	\$250.00	Prepare & File Online - F.941 and F.940
Assisted Payroll	\$50.00 per month	Assist with payroll for up to 2 employees
Assisted Payroll - Additional Employee	\$10.00 per month	Assist with payroll per additional employee
Full Service Payroll	\$100.00 per month	Process and Manage Payroll for up to 2 Employees
Full Service Payroll - Additional Employee	\$15.00 per month	Process and Manage Payroll per Additional Employee
W-2	\$250.00	Prepare, File, & Mail
1099	\$250.00	Prepare, File, & Mail

# HOW IT WORKS

This is our four-step process to onboard a new client, ensuring a smooth transition and setting the stage for a successful partnership

01

## Initial Consultation and Assessment

We begin with an introductory meeting to get to know each other, understand your business model, and discuss your specific bookkeeping and financial management needs. This step involves a detailed assessment of your current financial systems, bookkeeping practices, and any challenges you're facing.

02

## Proposal and Agreement

We provide a detailed proposal outlining the scope of services, deliverables, timelines, and pricing tailored to your business requirements. We discuss the proposal with you to ensure it meets your expectations and make any necessary adjustments.

03

## Onboarding

Once the proposal is finalized, we sign a service agreement that outlines the terms of our engagement, and confidentiality. We provide an overview of our bookkeeping processes, including how and when financial reports will be delivered, communication protocols, and how to submit documents and information to us.

04

## Ongoing Support and Communication

Following the onboarding, we establish regular check-ins to discuss your financials, any concerns, and adjustments to services as your business evolves. Our team remains available for any questions or additional support needed, ensuring a seamless and supportive partnership.

# FAQ's

## Category/Topic

### What kind of businesses do you serve?

We specialize in providing bookkeeping services for investment management and all small businesses.

### How do you ensure the confidentiality of our financial data?

Protecting your financial data is our top priority. We employ secure cloud-based accounting software to safeguard your information.

### Can you work with our existing accounting software?

We can seamlessly integrate with your existing system or recommend and help transition you to a system that better suits your needs.

## Category/Topic

### Do you provide tax filing services?

While our primary focus is bookkeeping, we work closely with your tax professional to ensure that your business complies with tax laws.

### How often will we communicate about my financials?

We offer quarterly or on-demand meetings to discuss your financials, strategies, and any concerns you might have.

### How can I get started with your services?

Contact us to schedule an initial consultation. We'll discuss your business needs, assess your processes, and propose solution for you.



DON'T SIT DOWN AND WAIT FOR  
THE OPPORTUNITIES TO COME.  
GET UP AND MAKE THEM.

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*Madam C.J. Walker*

what's  
NEXT



## Ready to get started?

*Partner with us for hassle-free, accurate, and reliable bookkeeping services tailored to your unique needs. We are committed to ensuring your financial success through comprehensive bookkeeping solutions, from day-to-day accounting to strategic financial planning.*

*Don't let bookkeeping tasks distract you from what you do best.*

*Elevate your business with our expert bookkeeping services – because when your finances thrive, so does your business*

**BOOK A CALL**

# Let us handle the numbers!

*Ready to take the stress out of your finances and focus on growing your business? Partner with us for hassle-free, accurate, and reliable bookkeeping services tailored to your unique needs.*

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# THANK YOU!



*Connect with me*



[www.mockingbirdmanagement.com](http://www.mockingbirdmanagement.com)