

Let's customize a package that meets you where you are:

Here are some examples of how we can customize your support.

<i>Is bookkeeping taking up too much of your time?</i>	Monthly Bookkeeping <i>You need someone to consistently handle transactions, reconciliations and monthly reporting so you can focus on running your organization.</i> • Record and categorize ongoing transactions • Reconcile bank and credit card accounts • Keep QuickBooks Online organized and current • Provide monthly financial reports
<i>Are you behind on the books and need to catch up?</i>	Clean-up Bookkeeping <i>Transactions have piled up, accounts haven't been reconciled, reports may not be accurate, or your CPA is waiting on financials.</i> • Catch up and reconcile outstanding accounts • Correct inaccurate or missing transactions • Review and clean up your Chart of Accounts • Get your financials ready for your CPA, board or funders
<i>Are you starting from scratch or moving beyond spreadsheets?</i>	QuickBooks Online Setup <i>You need QuickBooks Online set up correctly, with a chart of accounts designed around how your nonprofit actually receives and spends money.</i> • Set up Chart of Accounts • Set up your nonprofit in QuickBooks Online • Create a bookkeeping workflow that your team can easily maintain.
<i>Your books are current, but can you easily produce financials funders are looking for?</i>	Grant-Ready Bookkeeping Assessment <i>Funders are asking for financials. Are your books grant-ready? You want to track grants, programs, revenue and spending in a way that makes reporting and budgeting easier.</i> • Review how income, expenses and donations are being tracked • Identify gaps that could make grant reporting difficult • Make sure program and grant spending can be easily reported • Create a roadmap for more accurate budgets and financial reports

Not sure where you fit?

You may need one service or a combination of services. Let's talk about where your books are today and what would make things easier moving forward.

[Schedule a Call](#)