Three ways to work together.

Choose the level of accounting, tax, and advisory support that fits the business.

MONTHLY SCOPE

Each plan builds on the one before it.

	PLAN 1	PLAN 2	PLAN 3
	MONTHLY BOOKKEEPING	COMPLETE ACCOUNTING (RECOMMENDED)	PHAENIX ADVISORY
	$700 / month	$1,250 / month	$2,250 / month
Transaction categorization	Monthly	Monthly	Monthly
Bank + credit-card reconciliations	Up to 3 accounts	Up to 5 accounts	Up to 8 accounts
Financial statements	P&L + balance sheet	P&L + balance sheet	Enhanced reporting
Exceptions + missing-item review	Included	Included	Included
Bookkeeping questions	Routine support	Routine support	Priority support
Business + personal tax returns	Not included	1 business return	1 business + 1 personal
Advisory meetings	One 30-minute annual review	Two 90-minute sessions	Four 90-minute sessions
Tax + business planning	Not included	Midyear + year-end	Quarterly
Process redesign	Not included	First 90 days	First 90 days + quarterly
Tax projections	Not included	At planning meetings	Quarterly
Budget, KPI + performance reporting	Not included	Not included	Included
Cash-flow outlook + payroll support	Not included	Not included	Forecast + payroll ledger tie-out
Automation + AI-assisted workflow	Not included	Not included	Included
Decision support	Not included	Planned sessions	Priority access

SHARED ASSUMPTIONS

One operating business | One personal return | One state per return | Account limits shown above | Approx. 150 monthly transactions

Monthly close timing depends on complete, timely client information. Plans 2 and 3 are designed for a 12-month relationship.

Cleanup and catch-up work is assessed and quoted individually. Additional entities or states, bill pay, collections, payroll processing, migrations, and materially higher volume are quoted separately.