



## ***Payment Processing***

Our payment process is designed to accommodate your needs with transparency and flexibility. The method of payment is collected during onboarding and will be securely stored for future transactions. Future payments will be automatically processed using the credit card on file, ensuring convenience and timely completion of transactions.

Here's how it works:

- **Bookkeeping:**

- One-time set-up fee.
- Monthly Bookkeeping: Due on the first of the month.
- Cleanup Services: Consists of two payments - half of the total amount due paid in advance and the final payment due upon completion of work.

- **Tax Preparation:**

- Payment consists of two parts: the Retainer and the Final Payment.
- The Retainer Fee, half of the estimated total amount due, is paid in advance to secure future services.
- The Final Payment covers the outstanding balance upon completion of the Scope of Work. Additional costs for work outside of the agreed Scope or complexity will be included in the Final Payment, with advance notice provided.



- **Tax Planning:**

- Payment for Tax Planning includes:
  - A Retainer, securing future services (half of the total amount due for the Tax Plan).
  - Remaining half due upon delivery of the Tax Plan.
  - Payment for Tax Plan Implementations due upon completion of each implementation meeting.

Throughout the process, you will receive invoices from Intuit, our trusted bookkeeping platform, for your records and payment. We're here to address any questions or concerns you may have, ensuring a transparent and seamless payment experience as we partner together to meet your financial needs.