# Bookkeeping Proposal

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| Margie Wineburger, CPA  Financial Helpers  23544 Broadway Ave.  Corpus Christi, TX 78203 |  | Chelsie Hampton  Owner, Pilates by the Sea  23494 Kostorytz Ln.  Corpus Christi, TX 78203 |

Dear Mrs. Hampton,

Thank you for inquiring about our bookkeeping services. At Financial Helpers, we would be happy to help you with all your financial and bookkeeping needs. We have extensive experience working with fitness studios, as well as other small businesses, such as Pilates by the Sea. With Financial Helpers, you may rest assured that your financial records will be examined by competent staff, and we will ensure that your records are in accordance with all pertinent regulations and codes. Additionally, we will communicate with you regularly, and will be able to inform you of your financial status at any given moment. We will also work with you to establish financial goals and budgets, file all tax returns, and help **you obtain the most out of your money**.

Our process begins with a meeting to review your current financial situation and your company goals, to explain the different types of services that we offer, and to discuss any issues you wish to bring up. We will also set up a time for our comprehensive review of your financial records. During the review, which can take up to a week to complete, we will look over your current books, budget, and past tax records. We will also detail your company assets and liabilities, and confirm that they have been accurately assessed. Once we have your past records, we will work on getting everything current. Then, we will begin our regular work of keeping your financial records up-to date.

## Costs

Initial Review: $200

Regular Bookkeeping costs: $40 per hour, monthly minimum $200.

Annual Payment: $5000

You can choose to pay based on the hours we work or an annual fee to cover the entire year. Payment can be made by check or credit card, and we offer an installment plan. We offer a 10% discount if you pay the annual fee up front.

We look forward to working with you.

Thank you,

Margie Wineburger, CPA

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