SERVICE TIERS

Gone are the days of piecemealed, a-la-carte services that lack cohesion and strategy. With over 120 years of combined experience in small business accounting, tax, and finance, our team takes your finances from...

	CLARITY MESSY TO ORGANIZED	**PARTNER** REACTIVE TO PROACTIVE	**IMPACT** PROFITABLE TO WEALTH-CREATING
	Business owners in the Clarity Tier generally have smaller, low-to-mid 6-figure businesses, and are ready for a higher-level service. With new growth in action, clients in this tier get the support they need to clean up their financials and submit their tax returns with confidence.	Business owners in the Partner Tier have mid-six figure or seven figure businesses. They are focused on maximizing profitability as their business grows and need a more proactive, forward-thinking approach to their financial and tax strategy.	The Impact Tier is our all-hands on deck, high-touch point Virtual CFO service. Our seven to eight figure business owner clients are focused on optimizing cash flow, increasing business value, building teams, and investing to build their personal wealth.
Business and personal tax preparation	✔	✔	✔
Monthly bookkeeping and tax accountant	✔	✔	✔
Financial reporting	✔	✔	✔
Support from your dedicated bookkeeper and tax	✔	✔	✔
1:1 tax planning & strategy support with your experienced CPA		✔	✔
1:1 financial reviews with your dedicated senior accountant		✔	✔
1:1 monthly accounting		✔	✔
Enhanced financial reporting		✔	✔
Email & office hours support		✔	✔
Quarterly tax reviews & estimate		✔	✔
Tax strategy 1:1s		✔	✔
Financial forecasting			✔
Cash flow forecasting & management			✔
Customized goal-setting			✔
Benchmarking & improvement plan			✔
CFO strategy meetings			✔
Profit assessment			✔
Financial systems optimization			✔
Team incentive plans			
Email	✔	✔	✔
Slack			✔
Office hours		✔	✔
	$200 p/mo for Tax Support **$1,000 p/mo** for Tax & Books	**$500 p/mo** for Tax Support or **$1,500 p/mo** for Tax & Books support	**$3,000 p/mo** for CFO Financial Support **$5,000 p/mo** for Full Tax & Account Services

EACH TIER INCLUDES FULL ACCESS TO OUR YOUNG AND CO **CLIENT PERKS**

ALL YEAR LONG YOU CAN TAKE ADVANTAGE OF:

ASK THE ACCOUNTANT CALLS WITH THE TEAM

WEBINARS WITH OUR CEO, CFOs, AND OUR NETWORK OF EXPERTS ON BUSINESS AND MONEY TOPICS.

A **RESOURCE LIBRARY** WITH TEMPLATES AND TUTORIALS

DIRECTORY OF PREFERRED BUSINESS PARTNERS

DISCOUNTS ON ACCOUNTING AND PAYROLL SOFTWARE

HERE'S HOW THE **YOUNG AND CO PROCESS** WORKS:

1. FILL OUT OUR FINANCIAL ASSESSMENT QUESTIONNAIRE

Fill out the questionnaire on our website. We'll gather high-level information like your business revenue, team size, and budget and you'll upload financial reports or tax returns.

2. SCHEDULE YOUR FINANCIAL REVIEW CALL

Once you've scheduled your financial review call through our Calendly link, we'll identify what your current business and financial pain points are, discuss your goals and the support needed and clarify what tier suits your business best.

3. RECEIVE YOUR PROPOSAL

You'll receive a custom proposal from our team that you'll sign and from there, you'll get access to our secure client portal.

4. ONBOARDING!

Hooray! It's time to make it official. But first things first. You'll upload all requested documents into your client portal and give our team access to your financial systems. From there, we'll schedule your onboarding meeting with your Account or Tax Manager. Make sure to complete your new client checklist prior to that call.