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 process 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 low-to-mid six-figure businesses and are ready for a higher-level service. With new growth happening quickly, clients in this tier get the support they need to clean up their finances and submit their tax returns with confidence.	Business owners in the Partner Tier have mid-to-high six-figure businesses or have recently crossed into the seven-figure range. They are focused on 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.
Monthly bookkeeping	✔		
Basic financial reporting	✔		
Tax planning and preparation for business and personal	✔		
Support from your dedicated bookkeeper and tax accountant	✔		
Monthly accounting		✔	
Enhanced financial reporting and trend analyses		✔	
One-on-one tax planning, preparation, and strategy support for business and personal		✔	✔
Quarterly one-on-one financial reviews with our CFOs		✔	✔
Email and office hours support		✔	
Weekly accounting, reporting, and cash flow forecasting			✔
Enhanced reporting, trend analysis, benchmarking, and financial KPI tracking			✔
Forecasting and budgeting			✔
Growth plans and financial goal setting			✔
Team incentive plans			✔
Monthly one-on-one strategic calls with your dedicated Virtual CFO			✔
	Starts at **$1,200/mo**	Starts at **$2,000/mo**	Starts at **$4,000 /mo**

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

ALL YEAR LONG YOU CAN TAKE ADVANTAGE OF:

(ASK THE ACCOUNTANT) CALLS WITH THE TEAM

WEBINARS WITH OUR FOUNDER, SARAH YOUNG, AND OUR NETWORK OF EXPERTS ON BUSINESS AND MONEY TOPICS

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 service options suit 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!

But first things first: you'll upload all requested documents into your client portal and give our team access to your financial systems