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...

	MONTHLY ACCOUNTING Messy to Organized	THE FINANCE SUITE Reactive to Proactive	VIRTUAL CFO Profitable to Wealth-Creating
	Our Monthly Accounting service is ideal for service-based business owners generating $400K to $2M in revenue who are ready for clarity and a more elevated and holistic service than they've found with their bookkeeper and tax preparer.	**The Finance Suite is ideal for service-based business owners making $1M to $3M in revenue. They are focused on cash flow and profitability as their business and team grow and need a more proactive, forward-thinking approach to their financial and tax strategy.**	**Our VIP Virtual CFO service provides all-hands-on-deck, high-touch point support. Our $2M to $10M service-based business owner clients are focused on optimizing cash flow, increasing business value, building teams, and investing to build their personal wealth.**
Monthly Accounting	...✓	✓	Weekly
Financial Reporting	Monthly	Monthly	Weekly
Business & Personal Tax Prep	✓	✓	✓
1:1 Tax Strategy & Tax Planning With Your Tax Advisor	Annual	Quarterly	Quarterly
Monthly Tax Office Hours	✓	✓	✓
Email Suport	✓	✓	✓
1:1 Financial Advisory With Your CFO		Quarterly	Monthly
Access to The High Profit Society™	✓	✓	✓
Back Pocket Slack Support		✓	✓
Cash Flow Forecasting		✓	✓
Forecasting & Budgeting		✓	✓
Growth& Profitability Plans, Financial Goal Setting		✓	✓
Cash & Bank Account Management			✓
1099 Fililng	Optional - Add'l Fee	✓	✓
Payroll Management	Optional - Add'l Fee	Optional - Add'l Fee	✓
AP/Bill Pay Management	Optional - Add'l Fee	Optional - Add'l Fee	✓
Sales Tax Filings	Optional - Add'l Fee	✓	✓
	$1,500/$3,000/mo	**$2,500-$4,000/mo**	**$5,000-$10,000/mo**

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

ALL YEAR LONG YOU CAN TAKE ADVANTAGE OF:

MONTHLY GROUP ADVISORY CALLS & SUPPORT IN OUR CIRCLE COMMUNITY TO HELP YOU CREATE AND IMPLEMENT YOUR HIGH PROFIT STRATEGY

BUSINESS & MONEY TRAININGS FRAMEWORKS AND TEMPLATES TO HELP GROW YOUR BUSINESS AND WEALTH

A COMMUNITY OF GROWTH-MINDED ENTREPRENEURS FOR PEER ACCOUNTABILITY, SUPPORT, AND FEEDBACK

QUARTERLY CEO PLANNING DAYS TO MAP OUT YOUR 90 DAY PROFIT PLAN AND MAKE CONSISTENT PROGRESS TOWARD YOUR GOALS

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!

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.