

# SERVICE MENU + PRICING GUIDE



# TOP-NOTCH SERVICES

protect + strengthen + grow Your Bottom Line

WE  
SERVE IN  
ALL 50  
STATES

**The Bottom Line® CPA provides a  
virtual support system unlike any other.**

We become the financial support and strategic advisors  
behind your online and eCommerce business.



CPA



Bookkeeper



Profit Pro



Accountant



Tax Support



Family Friend

**We are experts in our field and we have the street cred to prove it!**



Silver  
Partner



**We are proudly 100% Xero!**

Xero is all you need  
to run your business  
from anywhere. See  
your cashflow in real-  
time with online billing,  
banking + accounting.



# \* OUR PARTNERS \*



**Our #1 Xero Add-On** that can literally remove a task or two or more from your VAs to-dos! This "gem" puts all your key financial docs in one place.... automagically. No more online accessing, downloading, and uploading to share your financial docs anymore!



**Our #2 Xero Add-On** we can't live without. It's hours of receipt management done in minutes with a smart online service that eliminates your paperwork and data entry. Trust us—this is a must-have financial tool for your online business!



Breathe in..... breathe out! We love how A2X gives Amazon Merchants automated accounting by posting easy to reconcile invoices to Xero. You can account for your Amazon income and expenses quickly and easily in a familiar Xero way.



When your business needs a robust online payroll provider, Heartland Payroll is likely your golden ticket! We've created a beautiful partnership with Heartland that includes can't beat pricing for full-service Payroll and HR services.



Xero US Payroll is our #1 choice for businesses with 5 employees or less. Xero is on a mission to deliver a seamless payroll experience. This could be the right solution if operating in the growing number of states Xero is in!



Sales tax.... an unavoidable reality for online retailers. We recommend and trust Taxify.co to take the pain out of managing and filing sales tax! Taxify plays oh-so-well with your online and eCommerce sales channels like Amazon FBA and Shopify!



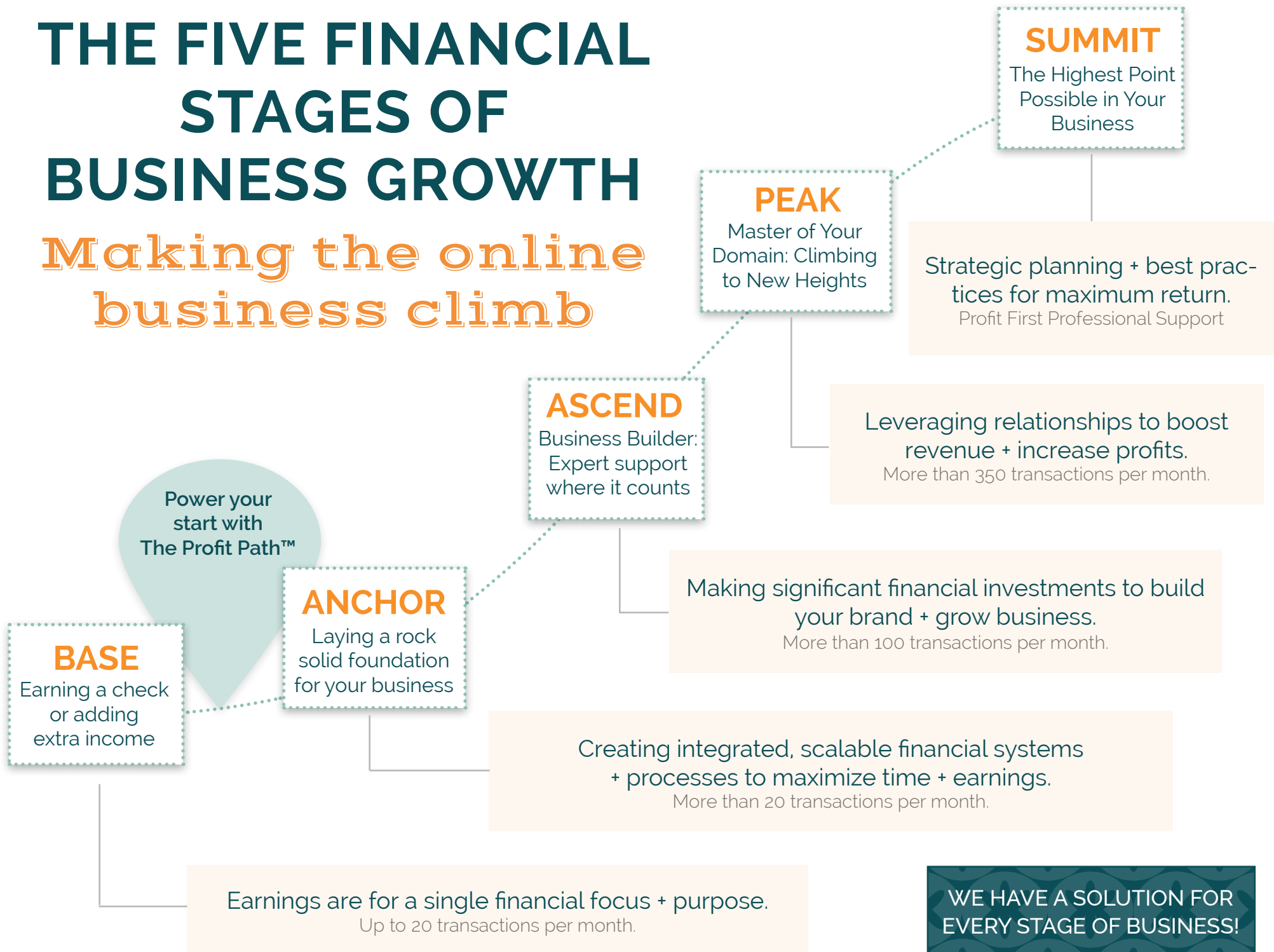
Take the hassle out of collecting W9s from and filing 1099s for your service-based professionals and companies that help you keep your online and retail business going with Track1099! It's easy online 1099-MISC and W-2 e-file that integrates well with Xero. Our tool of choice when it comes to W9 and 1099 reporting.

We also work with these providers and more:



# THE FIVE FINANCIAL STAGES OF BUSINESS GROWTH

## Making the online business climb



# CLOUD ACCOUNTING SERVICES

**MONTHLY PACKAGES** to build your business on solid rock

## The Profit Path™

### CPA-Supported Bookkeeping

The Profit Path™ has been designed as a growing and ever-expanding Membership Program that helps you gain mastery on how to manage and grow your money.

	Xero Standard	HubDoc Unlimited	ReceiptBank Multi-User Account	Expert Account Creation Setup	Step-by-Step Video Onboarding	Email Support	Reserved Seating for Tax Prep	Member Training + Resource Portal	Investment
<b>TPP</b>	✓	✓	✓	✓	✓	Unlimited	✓	✓	\$97/mo* OR \$1297/year
<b>TPP LITE</b>	✓	N/A	N/A	✓	✓	Limited	✓	N/A	\$47/mo* OR \$897/year

\*12-Monthly Payments — \$497 One-Time Setup Fee Applies

**Want to learn more about what The Profit Path™ has to offer?**

Get in depth details on our website - [click here!](#)

# CLOUD ACCOUNTING SERVICES

## MONTHLY PACKAGES to build your business on solid rock

### Ascend Packages

#### Accounting + Bookkeeping

For the growing Online Entrepreneur committed to working ON their business instead of IN their business!  
We're handling your day-to-day bookkeeping so you can focus on GROWTH without hassle or worry.

All Ascend package rates are all-inclusive and include the software for Xero Standard, Hubdoc, ReceiptBank, A2X, Taxify and more as needed.

	Records Updated	Coding + Bank Recs	Sales Channels	Sales Tax Filing**	Financial Period Closing	Advisor Meetings	Monthly Investment Starts At
<b>Level 1</b>	Bi-Weekly	3 - 5 Accounts	1 - 3 Channels	Up to 2 States	Quarterly	Semi-Annual	<b>\$497</b>
<b>Level 2</b>	Bi-Weekly	6 - 8 Accounts	4 - 5 Channels	3 - 7 States	Quarterly	Quarterly	<b>\$697</b> MOST POPULAR
<b>Level 3</b>	Bi-Weekly	9+ Accounts	6+ Channels	8+ States	Quarterly	Quarterly	<b>\$897</b>

\*One-time setup fee for 30- to 45-day onboarding period starts at \$1500. Services must be applied for and quoted in advance.

\*\* Monthly service rates will vary depending on number of states, filing frequency per state, and other factors.

\* Monthly services for rapid-growth businesses are evaluated each 90-day period; plans will be reviewed and discussed/adjusted as needed and agreed. Can downgrade or cancel services with 30-day written notice and completion of one full billing cycle.

**CLICK HERE** to  
schedule an online  
appointment for a **FREE**  
Discovery session

All Packages are Month-to-Month via AutoPay  
Rates are subject to change. We quote your  
business to finalize acceptance.



# CLOUD ACCOUNTING SERVICES

**MONTHLY PACKAGES** to build your business on solid rock

## Peak Packages *Full Service Accounting*

We are your full-service accounting firm for hire! Stay focused on leveraging your booming business and increasing those profits!

All Peak package rates are all-inclusive to include Xero Standard, Hubdoc, ReceiptBank, A2X, Taxify and more as needed.

	Records Updated	Coding + Bank Rec	Sales Channels	SalesTax Filing**	A/P, A/R, Payroll Services	Advisor Meetings	Monthly Investment Starts At
<b>Level 1</b>	Weekly	Up to 10 Accounts	Up to 8 Channels	Up to 12 States	☑	Monthly	<b>\$1250</b> MOST POPULAR
<b>Level 2</b>	Weekly	Up to 15 Accounts	Up to 10 Channels	Up to 15 States	☑	Monthly	<b>\$2500</b>
<b>Level 3</b>	Semi-Weekly	16+ Accounts	11+ Channels	16+ States	☑	Bi-Weekly	<b>\$3250</b>

One-time setup fee for 30- to 45-day onboarding period starts at \$3000. Services must be applied for and quoted in advance.

\*\*Monthly service rates will vary depending on number of states, filing frequency per state, and other factors

\* Monthly services for rapid-growth businesses are evaluated each 90-day period; plans will be reviewed and discussed/adjusted as needed and agreed. Can downgrade or cancel services with 30-day written notice and completion of one full billing cycle.

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# INCOME TAX PREP + FILING

Expert tax services reserved exclusively for The Bottom Line® CPA clients.

We do not provide tax services to non-TBL clients at this time.

	Personal (Form 1040EZ, 1040A, or 1040 with Schedule C or E)	Business (Forms 1065, 1120, and 1120S)	Non-Profit (Form 990)
Federal (per return)	\$147	\$497	Starting at \$1297
	\$347	\$697	
	\$497	\$997	
	Custom	Custom	

## State

\$147 per return

\$247 per return\*

Not a Xero client  
or need help?

Schedule a Tax Strategy  
Session for \$497

\* Rates provided are subject to change. Pricing based on your own personal tax situation.

\* All tax services are offered but not required. Clients will receive a personal quote for tax services based on prior year return + any changes noted for acceptance before return is prepared.

These fees are based on tax-ready information being provided and does not include any need for financial compilation of data. If your info is not tax-ready, write-up work may be required. Write-up work must be quoted. Write-up for up to 12 months of data starts at \$1500.



# BUSINESS ENTITY STARTUP

Starting a new business or ready to get your growing business running legit?

Our Business Entity Services are the best fit to get all the answers you need and your new entity filing done for you!

## OUR STARTUP SERVICE IS A 2-STEP PROCESS:

### 1 Business Entity Strategy

- \* 60- to 90-minute strategy session with one of our CPAs to gather + review all pertinent details about you + your biz
- \* We get right to work researching all the rules + regulations relative to your state + business
- \* We provide you with a written overview of your options with recommendations on which way to go, complete with filing expectations, timelines + fees.

**\$497**

### Changing, closing, or dissolving a business?

We can help you change, close, or dissolve your old entity. Services are similar to startup but require a custom quote due to varying needs.

### 2 Business Entity Startup

- \* Will file all the necessary paperwork to set up your new entity in the state you elect + up to 3 dba registrations + 1 foreign entity filing
- \* Obtain Federal EIN from the IRS on your behalf
- \* Review Payroll + sales tax how-to, if needed

**\$297** (per entity)

*Does Not Include State Filing Fees.*

**Get Started for \$497**

# WHAT ARE YOU WAITING FOR?

Let's start a conversation so you can decide if  
we are the RIGHT accountant for you!



**CLICK HERE**

to speak to an online business specialist today!

No Cost. No Risk. No Obligation.

