

# Accounting Suites

Three Levels of Support. One Seamless Partnership.



## ACCOUNTING SUITES

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Every business has unique financial needs. That's why we offer three distinct service tiers — each designed to evolve with your company as it grows in size, complexity, and strategic ambition.

#### Core Compliance

Starting at \$800/month

For startups and small businesses needing dependable accounting fundamentals and clean books.

##### Includes:

- ✓ Daily bookkeeping and general ledger management
- ✓ Monthly reconciliations (bank and credit accounts)
- ✓ Accounts payable and receivable tracking
- ✓ Monthly financial statements (P&L, Balance Sheet, Cash Flow)
- ✓ Year-end CPA/tax prep package (informational only)
- ✓ Up to 4 hours of monthly advising

**Build your financial foundation — reliable, accurate, and ready for growth.**

#### Insight Management

Starting at \$2,400/month

For growing businesses ready to use their financial data as a management tool.

##### Includes:

- ✓ Diagnostic onboarding (throughput, DSO, cashflow evaluation)
- ✓ Cash-flow forecasting (6–12 week rolling visibility)
- ✓ Payroll processing and compliance
- ✓ KPI dashboards (basic metrics and gross-margin tracking)
- ✓ Option to upgrade to enhanced analytics and industry benchmarks
- ✓ Workflow dashboard and monthly performance review meeting

**Turn data into direction — make informed decisions with confidence.**

#### Vision Advisory

Custom pricing

For established organizations needing controller-level partnership, strategic forecasting, and insights.

##### Includes everything in Insight, plus:

- ✓ Strategic diagnostic (QuickBooks review, cashflow, debt, throughput)
- ✓ Accrual-based month-end close and reporting
- ✓ Advanced analytics and departmental reporting
- ✓ Scenario and multi-model forecasting
- ✓ 2–4 hours of CFO advisory each month
- ✓ Audit and investor due-diligence support

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## Why FinSource?

- ✓ Seamless team integration through U.S.-based project managers
- ✓ Skilled financial talent experienced in U.S. business standards
- ✓ Lower costs without sacrificing quality
- ✓ Freed resources to redirect into growth, strategy, and impact

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## Compare Tiers

Feature	Core Compliance	Insight Management	Vision Advisory
Dedicated Accountant	✓	✓	✓
U.S.-Based Oversight	✓	✓	✓
Daily Bookkeeping	✓	✓	✓
Monthly Reconciliation	✓	✓	✓
KPI Dashboard		✓	✓
Cash-Flow Forecasting			✓
Accrual Reporting		✓	✓
CFO Advisory			✓
Custom Workflow Dashboard		✓	✓
Strategic Forecasting			✓
Pricing	Starting at \$800/mo	Starting at \$2,400/mo	Custom

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