




How To Work With Me

A step by step guide to outsourcing
your QuickBooks Online bookkeeping



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 breakfreebookkeeping.com



Sound Familiar?

I have too much on my plate as it is. I don't have enough time to keep up with my books.

I didn't go into business to become a bookkeeper. It's frustrating to learn accounting software.

I can't afford to pay for professional bookkeeping services (it costs less than you think).

Break free from the overwhelm!

I help small business owners get their bookkeeping set up, caught up and kept up using QuickBooks Online so they can exhale the stress of bookkeeping and inhale the freedom to pursue their passion.

In three easy steps, you'll be on your way to better bookkeeping and financial peace of mind:



Set Up

If you're new to QuickBooks Online, I'll get your account set up. If you have an existing account, I'll identify any existing issues.



Catch Up

If needed, I'll clean up and catch up prior months historical transactions to get your books up to date.



Keep Up

Sit back and relax while I do your bookkeeping with ongoing services designed specifically for your business.

Hi! I'm Carrie!

Your Bookkeeping Professional



I've always been a "numbers girl." As the office manager for my father's manufacturing business for 20+ years, I was responsible for all the accounting tasks. I was responsible for all the bookkeeping tasks in my women's boutique business and I still keep the books for my husband's businesses. I'm the treasurer of our local business alliance. Working with numbers is something I really enjoy; it's what I'm best at. I welcome the opportunity to use that talent to help grow your small business and give you financial peace of mind.

MY QUALIFICATIONS

- 25+ years accounting and bookkeeping experience
- Associate Degree in General Business
- Bachelor Degree in Business Leadership
- QuickBooks Online Certified ProAdvisor
- Intuit Certified Bookkeeping Professional
- Member of American Institute of Professional Bookkeepers



QuickBooks Online Check Up

Start here if you already have a QuickBooks Online Account. Includes a deep dive into your account to identify issues and problems, along with a summary report and recommended next steps.

QuickBooks Online Set Up

Start here if you have no bookkeeping system in place or you're using different software. Includes customizing settings, company preferences and chart of accounts, connecting bank and credit card feeds and importing data from previous software.

Clean Up/Catch Up of Historical Transactions

Clean up and catch up prior months to get your books up to date. Includes updating chart of accounts, correct categorization of all transactions, reconciliation of bank, credit card and loan accounts, and Accounts Payable and Accounts Receivable correction.

Ongoing Services

Includes updating and categorizing income and expense transactions, reconciling bank, credit card and loan accounts, month-end and year-end adjusting journal entries, monthly financial statements, and annual tax-prep package for your tax preparer.

Add-On Services

- ✓ A/R Invoice Management
- ✓ A/P Bill Payment Assistance
- ✓ QuickBooks Online Training

Pricing

I don't have set one-size-fits-all pricing for my services because EVERY business is unique:

- How is your business legally structured?
- How many transactions do you have every month?
- Are your business and personal transactions kept separately?
- How many bank, credit card and loan accounts do you have?
- How do you get paid from your customers?
- How do you pay your vendors and suppliers?
- Do you use any industry-specific apps or software?
- Do you have employees?
- Do you use subcontractors?
- Do you have inventory?
- Do you pay sales tax?
- How frequently do you want your books updated?

I take all these factors into consideration before giving you a price for services. And, because all my services are designed specifically for YOUR business and YOUR needs, you'll only pay for what you need and nothing more.

“

Every problem is a gift—
without problems
we would not grow.

– Anthony Robbins

”

How It Works

My four-step process to onboard new clients is designed to set the stage for a successful partnership:

01

Initial Consultation

Let's connect with a FREE 15-Minute Consultation to discuss your business, your current financial systems and bookkeeping needs and see if we're a good fit to work together.

02

Proposal

After our initial consultation, I'll provide a detailed proposal outlining the scope of services, timelines and pricing specific to you and your business needs, and I will review the proposal with you to ensure it meets your expectations.

03

Onboarding

Onboarding will begin once the proposal is accepted, we sign an engagement letter that outlines the terms of our engagement and you pay the initial invoice. I'll then provide you with instructions so you know how to submit requested documents and information.

04

Ongoing Support and Communication

Following onboarding, services begin! We will establish regular check-ins to discuss your financials, any concerns, and adjustments to services as your business evolves. I will always be available for questions and/or additional support, ensuring a seamless and supportive partnership.

FREQUENTLY ASKED QUESTIONS



I'm not using QuickBooks Online. Can you help with (insert accounting software here)?

I specialize in and work exclusively with QuickBooks Online.

Do you work with businesses outside the United States?

No. I only work with companies using the U.S. edition of QuickBooks Online and with connected domestic bank feeds.

How does your service work?

All of my services are done virtually; I do not come to your office or business. Through online bookkeeping software and mobile apps, I work remotely to manage all your company's day-to-day financial tasks. You provide me with information and/or source documents so that I can ensure I have recorded your income and expenses properly.

How do I communicate with you?

Communication is of the utmost importance. I might be outsourced, but I am still on your team. I am always available to answer your questions by phone or email. And I will always respond to you within our agreed upon time frame.

Is my information secure?

I recognize that confidentiality and security of your information is VERY important. All applications and data are kept in secure, encrypted cloud storage.

Will I still be in control of my business finances?

Absolutely! I do not make deposits and I do not write checks; I only maintain an organized record of all your financial transactions. And with this information up to date, you'll spend less time managing your books and more time focusing on what you do best: running your business.


What's Next?

Ready to get started?

Let's connect with a FREE 15-Minute Consultation to discuss your business, your current financial systems and bookkeeping needs and see if we're a good fit to work together.

Book a Call

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