Hello,

I wanted to take a minute to thank you for considering my business for your bookkeeping needs and to share with you some information about Breslow's Bookkeeping Business. I realize this may be your first experience working with a bookkeeping service, so I hope the enclosed packet is helpful. I certainly appreciate your business and want to make sure you are receiving exceptional client service in all interactions with me. If there is anything you think I could do to provide my services more effectively, please let me know.

The enclosed packet contains the following items:

- Contact information and how best to reach me
- Frequently asked questions form
- Reference Page
- Information Sheet for Client: This form will provide you with information about billing, fees and expenses. Please retain for your records.
- Bookkeeping Service Agreement.
- Referrals

If you have any questions or concerns, please contact me at 215-272-5217. It would be my pleasure to hear from you and to answer your questions. I truly appreciate the opportunity to work with you.

Sincerely,

Beth Breslow, Owner
Breslow's Bookkeeping Business

Contact Information

Beth Breslow, Owner
Breslow's Bookkeeping Business
Email: breslowsbooks@gmail.com
Cell: 215.272.5217
Website: www.breslowbookkeeping.com

Please contact me via phone or email anytime between the hours of 9 a.m. and 5 p.m. Monday through Friday

Frequently Asked Questions

- ✓ **Who will I be working with at Breslow's Bookkeeping Business?**
  - Rest assured that by utilizing Breslow's Bookkeeping Business, you will be working solely with Beth Breslow.
- ✓ **What is the makeup of our typical client?**
  - Breslow's Bookkeeping Business focuses on working with small business owners to maintain accurate bookkeeping records.
- ✓ **Will you work in my office?**
  - The great thing about hiring Breslow's Bookkeeping Business is that the work will be completed remotely. If needed, a visit to your office can be arranged.
- ✓ **How do I get started?**
  - Initial Meet and Greet
  - Completion of the Onboarding Checklist
  - Execution of the Service Agreement
- ✓ **Will Breslow's Bookkeeping Business file my income tax returns?**
  - Breslow's Bookkeeping Business specializes in providing everything your CPA accountant will need to prepare your business tax filings. Tax filing is for your specific accountant to perform.
- ✓ **What software or accounting systems does Breslow's Bookkeeping Business use?**
  - The software program is your choice, whether it is QuickBooks Online or QuickBooks desktop.
- ✓ **What is the difference between QuickBooks Online and QuickBooks desktop?**
  - QuickBooks online will cost the business owner a monthly fee; typically starting at $35+/month. You can access your books at any time via the internet.
  - The client cannot access QuickBooks desktop unless they have their own Quickbooks desktop software as well as subscribe to the monthly QBox server fee. If you do not want to pay a monthly Quickbooks subscription, Breslow's Bookkeeping Businesses' will store the file on computer. There is no additional monthly fee for this service.
- ✓ **I worry about my confidentiality? What are your security standards?**
  - Breslow's Bookkeeping Businesses understands your concerns. Your information will not be shared with anyone. All information contained on our computer is secured by Norton 360 security anti-virus software. All information sent between us will be encrypted by ShareFile
  - Safety of personal information is our #1 priority.
- ✓ **How do you access my documents?**
  - Our preference is to gather all statements utilizing online logins.
  - For any other files, we can share via Dropbox, Google Drive or Sharefile
- ✓ **Do you handle my payroll?**
  - Breslow's Bookkeeping Business will work with the payroll processing company of your choice to file your payroll. We can also recommend a payroll company that suits your company's needs.



Information Sheet

- You will be charged a monthly rate that starts at $85 for the basic plan. If looking for Quickbooks online training that can be discussed.

- In addition to this hourly rate, you could also be billed for the following:
  - A monthly fee if you choose QuickBooks Online (discounted rate through me as a ProAdvisor)
  - A monthly fee to QBOX if choosing Quickbooks Desktop with access to the file.
  - Postage reimbursement for any bills mailed on your behalf.
  - Filing fee reimbursement for any filings we do on your behalf.
  - For bill pay clients, reimbursement for the cost of business checks compatible with a printer.

- All clients will receive their previous month's invoice electronically by the 15th of the month. Payments are due upon receipt of the month to avoid late fees. A late fee of 1.5% will be added if over 30 days past due.

- I can and will work directly with your accountant as needed. He/She will have everything needed to file your business taxes for year-end provided by me in an organized and accurate manner.

• Beth Breslow • 215.272.5217 • breslowsbooks@gmail.com • www.breslowbookkeeping.com •



REFERRALS

Referrals are the best gift a client can give. As a thank you, for each referral provided that turns into a client, I will reduce your hourly rate by $5.00 for that month.

Thank you in advance!

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