YOUR  
LOGO

**COMPANY NAME**

ACCOUNTING SERVICES PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Firm Name] to provide professional accounting services. We offer reliable, transparent, and strategic financial support to help businesses manage their finances and remain compliant with all applicable regulations.  
  
This proposal outlines how we will assist [Client Name] with ongoing accounting and reporting needs.

# Problem or Opportunity

[Client Name] requires timely, accurate financial management and reporting to ensure smooth operations, informed decision-making, and regulatory compliance.

# Proposed Solution

We propose a full-service accounting engagement tailored to [Client Name]’s business structure and goals.  
  
Key Benefits:  
- Accurate financial tracking and reporting  
- Compliance with local tax and accounting regulations  
- Strategic insights to support financial decisions

# Scope of Work

Our accounting services include:  
  
- Bookkeeping and financial recordkeeping  
- Monthly or quarterly financial statements  
- Payroll processing and reporting  
- Tax preparation and filing  
- Budgeting and cash flow forecasting  
- Support during audits or financial reviews

# Timeline

Estimated schedule for onboarding and ongoing service delivery:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Client Onboarding | Information gathering and system setup | [Start Date] |
| Initial Reporting | Deliver first financial reports | [Date] |
| Monthly Cycle | Ongoing bookkeeping and reporting | [Ongoing] |
| Annual Filing | Year-end close and tax preparation | [Fiscal Year-End] |

# Pricing

Estimated pricing for monthly accounting services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Monthly Cost |
| Bookkeeping | Daily/weekly transaction recording | [Amount] |
| Financial Reporting | P&L, balance sheet, cash flow | [Amount] |
| Payroll Services | Monthly payroll processing | [Amount] |
| Tax Filing | Quarterly or annual tax preparation | [Amount] |
| Total |  | [Total] |

# About Our Firm

[Your Firm Name] is a trusted accounting partner to small and mid-sized businesses, offering responsive service and strategic expertise.  
  
- Experience: [X] years in public and private accounting  
- Certifications: [CPA, CMA, etc. if applicable]  
- Mission: To simplify financial management so our clients can focus on growth

# Case Studies / Testimonials

Case Study: [Client Business Name]  
  
- Project: Complete financial restructuring and automation  
- Outcome: Streamlined reporting and 30% cost savings in tax year  
  
Testimonial:  
“[Your Firm Name] transformed our bookkeeping and gave us back valuable time to grow the business.” — [Client Name], [Title]

# Terms and Conditions

Payment Terms: Monthly billing; due within 15 days of invoice.  
Confidentiality: All financial data is handled securely and confidentially.  
Engagement Period: Initial agreement for [X] months with option to renew.

# Acceptance

To begin accounting services, please sign below.  
  
Signature: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_  
Name: [Client’s Printed Name]  
Title: [Client’s Title]  
Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_