YOUR  
LOGO

**COMPANY NAME**

BOOKKEEPING PROPOSAL

Prepared by:

**[Client Name]**

**[Contact information]**

**[Date]**

# Introduction

Thank you for considering [Your Company Name] for your bookkeeping needs. We provide accurate, timely, and reliable bookkeeping services to help you maintain financial clarity and stay focused on growing your business.  
  
This proposal outlines the scope of services and support we will provide to [Client Name].

# Problem or Opportunity

[Client Name] is looking to streamline their financial recordkeeping and ensure up-to-date, accurate financial data for compliance, reporting, and business decision-making.

# Proposed Solution

We propose a monthly bookkeeping service that includes transaction recording, reconciliations, reporting, and general ledger management.  
  
Key Benefits:  
- Accurate and organized financial records  
- Timely insights into cash flow and expenses  
- Reduced risk of errors and penalties

# Scope of Work

Our bookkeeping services include:  
  
- Recording income and expenses  
- Bank and credit card reconciliations  
- Accounts payable and receivable tracking  
- Monthly financial reports (P&L, balance sheet)  
- Payroll entry support (if needed)  
- Support during tax filing season

# Timeline

Estimated timeline for onboarding and monthly bookkeeping cycles:

|  |  |  |
| --- | --- | --- |
| Milestone | Description | Estimated Date |
| Client Onboarding | Setup and account access | [Start Date] |
| First Month Cycle | Initial data entry and reconciliation | [Date] |
| Ongoing Services | Monthly bookkeeping and reporting | [Monthly] |
| Year-End Summary | Prep for tax season and review | [Fiscal Year-End] |

# Pricing

Estimated pricing for ongoing bookkeeping services:

|  |  |  |
| --- | --- | --- |
| Service | Description | Monthly Cost |
| Transaction Recording | Categorization and data entry | [Amount] |
| Reconciliations | Bank and credit card accounts | [Amount] |
| Financial Reports | P&L, balance sheet, cash flow | [Amount] |
| Total |  | [Total] |

# About Our Company

[Your Company Name] is a trusted provider of bookkeeping and financial management support for small to mid-sized businesses.  
  
- Experience: [X] years in bookkeeping and small business support  
- Tools: QuickBooks, Xero, Wave, [Others as applicable]  
- Mission: To make bookkeeping simple, accurate, and stress-free

# Case Studies / Testimonials

Case Study: [Client Business Name]  
  
- Project: Monthly bookkeeping and reporting setup  
- Outcome: Improved cash flow visibility and simplified tax prep  
  
Testimonial:  
“[Your Company Name] gave us peace of mind and helped us stay on top of our finances every month.” — [Client Name], [Title]

# Terms and Conditions

Payment Terms: Monthly invoicing, due within 15 days.  
Service Period: Ongoing month-to-month engagement with 30-day cancellation.  
Confidentiality: All financial data and communications remain strictly confidential.

# Acceptance

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