VuLedger

BOOKKEEPING SERVICE

Pricing & Terms

Serving small businesses, contractors, and self-employed professionals | hvu.accounting@yahoo.com

Included in every monthly plan

- Categorizing all bank and credit card transactions in QuickBooks Online
- Monthly bank and credit card reconciliations
- Monthly Profit & Loss report emailed to you as a PDF
- Follow-up questions on unclear or uncategorized transactions
- Secure access through a QuickBooks invitation, so I never need your passwords
- Email support with replies within 2 business days

Monthly bookkeeping plans

Plan	Monthly fee	Volume covered	Best for
Starter	**$250**	Up to 100 transactions/month, across up to 3 accounts (e.g., 1 bank + 2 credit card)	Freelancers, solo contractors, side businesses
Standard	**$400**	Up to 200 transactions/month, across up to 5 accounts	Small businesses with steady activity
Custom	**Quote**	More than 200 transactions/month, more than 5 accounts, or more complex needs	Growing or higher-volume businesses

Not sure which plan fits? After a free consultation, I'll count transactions from your last 3 months of statements and recommend one.

Additional & one-time services

Service	Rate
Intro consultation – 20 minutes, no obligation	**Free**
Onboarding & QuickBooks setup – chart of accounts, bank feeds, categorization rules	**$100 one-time**
Catch-up / cleanup of prior months – written quote, 100-300 transactions	**$150-$300**
Year-end close – final reconciliations, year-end P&L and balance sheet, vendor payment summary for your tax preparer	**$150/year**
Additional bank or credit card account – beyond your plan's limit	**$50/month each**
Invoicing, bill entry & payment tracking	**$200/month**

Payment & terms

- **Getting started:** new clients pay the full quote up front, before any work begins. The quote covers onboarding, any catch-up work, and your first month's fee.
- **Billing:** after your first month, plans are invoiced in advance on the 1st and due by the 15th. A $25 late fee applies after that, and work pauses if an invoice is 30 days past due. Your monthly report is released once that month's invoice is paid. Other additional services, such as year-end close, are invoiced upon completion.
- **Payment methods:** ACH transfer, check, Zelle (preferred) or Credit card (3% processing fee).
- **Pre-pay discount:** save 5% when you pre-pay six months.

- **Cancellation:** month-to-month, with 30 days' written notice from either side. Your books stay yours, and I hand everything off at no charge.
- **Rate changes:** reviewed annually with 30 days notice.
- **Quotes:** your quote is based on your last 3 months of statements and is valid for 30 days. Catch-up work is quoted at a fixed price, and I send a revised quote before doing any work beyond it.
- **Plan limits:** if your volume goes over your plan's limit two months in a row, I recommend moving you to the next plan or a custom quote.

How it works

1. Book a free consultation and I will recommend a plan.
2. Send 6 to 12 months of bank and credit card statements (at least 6 months, and back to January 1 if you want this year caught up). I review your overall finances and send a written quote based on your last 3 months.
3. Pay the quote in full, sign a short engagement letter, and invite me to your QuickBooks Online (I can help you set one up).
4. Each month, send your bank/credit card statements and receipts. Payroll reports. Any POS/Merchant processor reports. Any loans/financing statements.
5. I close the month and email your Profit & Loss report by the 15th.

Not included

These are bookkeeping services only. They do not include tax return preparation or filing, payroll processing, 1099 or W-2 filing, sales tax filing, tax, legal, or financial advice, audit or attest services, or representation before the IRS or other agencies. QuickBooks subscription, payroll, and app fees are paid directly by you and are separate from my fees.

Ready to get started? Email hvu.accounting@yahoo.com to book your free 20-minute consultation.