



PROPOSAL KIT SAMPLE

Accounting and Payroll Services Proposal

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Rachael Ikenberry
General Manager
Valley Fitness, Inc.
17712 116th Way
Kent, WA 98802

Mrs. Ikenberry,

Thank you for taking the time to talk with me last week. I know that your business office accounting has been a high priority problem for you. I am pleased to propose a cost effective solution that will minimize your in-house burden.

As you know we are specialists in Accounting and Payroll services with over 40 years of experience. We pride ourselves in providing our clients with a professional service, guaranteed accuracy and the highest level of confidentiality.

Your attached cost summary is based upon your current needs and can be adjusted as we customize your services.

I look forward to discussing your project with you in more detail shortly.

Please contact me directly anytime you have additional questions or requests.

Sincerely,

Mary Stratton
President
Applied Accounting Services
425-740-8478
Mary.Stratton@AACServices.com
www.AACServices.com



PROPOSAL

Accounting and Payroll Services

Prepared for: Rachael Ikenberry
General Manager

Prepared by: Mary Stratton
President





EXECUTIVE SUMMARY

The Objective...

Valley Fitness, Inc. is in need of Accounting and Payroll services to take over for an overburdened owner/manager. With limited office staff the accounting and payroll functions have been suffering. Outsourcing these office activities will allow the owners/management to focus on other aspects of the business.

The Goals...

Valley Fitness, Inc. is a small privately owned organization that now requires professional accounting and payroll services in a cost effective manner.

The goals of Applied Accounting Services are:

- Provide professional accounting and payroll services
- Provide services at a lower cost than possible if done by an in-house staff member
- Guarantee on-time payroll and other account payables

The Solution...

Applied Accounting Services specializes in Full Accounting and Payroll services for mid-size businesses. All staff accountants are CPA's with additional tax attorney services available through our corporate office location in Kirkland, WA.

We will provide Accounting Services to include:

- Daily, Quarterly and Yearly accounting reconciliations
- Year End Tax statements and summaries
- Quarterly tax Payment reports
- Ledger Maintenance
- Inventory account balancing

Payroll Services to include:

- Standard pay period check determination and origination
- Withholding allotments
- Benefit Summaries

Accounts Payable Services to include (upon request):

- Payment of all bills owing
- Budget Plan negotiations
- Negotiation for terms





COST SUMMARY

The following is an estimate and summary of the costs associated with Applied Accounting Services offering for Accounting and Payroll services. These numbers are an estimate only.

Initial Account Set-Up	Amount
Conversion to AA Services	\$1,200.00
Q1, Q2 Reports	\$300.00
Current Standing Report	\$500.00
Total Set-Up Costs:	\$2,000.00
Ongoing Yearly Costs	
Quarterly Tax Documents	\$1,600.00
Quarterly Filings	\$800.00
Quarterly Reports	\$2,000.00
Year End Summaries	\$300.00
Year End tax Filing Summaries	\$300.00
Employee Benefit Reports	\$200.00
Total Ongoing Yearly Costs:	\$5,200.00
Ongoing Monthly Costs	
Daily Account Reconciliations	\$600.00
Bi-Weekly Payroll	\$300.00
Total Ongoing Monthly Costs:	\$900.00
Total Set-Up Amount	\$2,000.00
Total Yearly Amount	\$5,200.00
Total Monthly Amount	\$900.00

Standard Disclaimer: The numbers represented above are to be used as an estimate for the projects discussed. The above Cost Summary does in no way constitute a warranty of final price. Estimates are subject to change if project specifications are changed or costs for outsourced services change before being locked in by a binding contract.



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