



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
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www.AACServices.com



Proposal

Accounting and Payroll Services

Prepared for: Rachael Ikenberry
General Manager

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Description

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.

Proposal Number: 534-45002



www.AACServices.com

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[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 Seattle, 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



[Client Operations

Valley Fitness is a privately owned and operated fitness club with 3 locations. Started in 1998 with 5 staff members, the clubs now employ 12 employees per location and a client base of approximately 1400. Office accounting and payroll staff currently consists of the owners who took over the responsibility when the FT accountant did not return from extended medical leave. This lack of a FT accounting and payroll person has led to a backlog of data entry, poor inventory control, payroll not being met on time and tax filing past due.

Once Applied Accounting Services is responsible for all accounting and payroll, the owners will be relieved to return to the FT management of their clubs. AA Services will bring all accounting, payroll, accounts payable and tax filing current.



[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	Price
Conversion from Valley Fitness to AA Services	\$ 1,200
Production of Q1, Q2 Reports	\$ 300
Production of Current standing report	\$ 500
Total Set-Up Costs:	\$ 2,000
Ongoing Monthly Costs	
Daily Account Reconciliations	\$ 600 p/mo
Bi-Weekly Payroll	\$ 300 p/mo
Total Ongoing Monthly Costs:	\$ 900
Ongoing Quarterly/Yearly Costs	
Quarterly Tax Documents	\$ 400 p/qtr
Quarterly Filings	\$ 200 p/qtr
Quarterly Reports	\$ 500 p/qtr
Year End Summaries	\$ 300 p/yr
Year End Tax Filing Summaries	\$ 300 p/yr
Maintenance of Employee Benefit Reports	\$ 200 p/yr
Total Ongoing Quarterly/Yearly Costs:	\$ 1,900
TOTAL SETUP AMOUNT	\$ 2,000
TOTAL MONTHLY AMOUNT	\$ 900
TOTAL QUARTERLY/YEARLY AMOUNT	\$ 1,900

Standard Disclaimer: The numbers represented above are to be used as an estimate only. The above Cost Summary does in no way constitute a warranty of final pricing. Estimates are subject to change if the project specification of terms of contract are changed in any way.



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