

CLIENT ONBOARDING WELCOME PACKET

SHARAPOVA & CO.





WELCOME I'M YULIA

I'm passionate about helping business owners with tactics that lead to growth and expansion. Thank you for considering me as your partner in financial management.

At Sharapova & Co., we believe that managing your finances effectively is the cornerstone of business success.

WE'RE DESIGNED TO HELP YOU SCALE...

My mission is to provide comprehensive, reliable, and personalized tax planning & bookkeeping services that empower businesses to focus on their core activities while maintaining financial clarity and compliance. Through my services, I aim to ensure accuracy in financial records, utilize best tax strategies, provide insightful financial reporting, and support strategic business decisions.

Together, we'll elevate your finances to new heights, unlocking the potential for success that your business deserves. Thank you for considering us as your trusted partner.

Yulia Sharapova

SHARAPOVA & CO.

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PACKAGE DETAILS

INVESTMENT

By investing in this package, you'll gain access to expert financial oversight, ensuring accurate and up-to-date financial records that are essential for informed decision-making and strategic planning.



SERVICE

Our package offers a comprehensive suite of services tailored to businesses and entrepreneurs looking to streamline their financial processes and gain a clearer insight into their financial health.



OUTCOME

Through diligent analysis of your business, along with up-to-date tax strategies, you'll have a real-time view of your cash flow, enabling better management of your resources.



ONBOARDING STEPS

Our goal is to simplify your financial processes and ensure your business's financial health is in the best hands.

1

KICK-OFF MEETING

Schedule a kick-off meeting to review the onboarding process, confirm understanding of the scope of work, and clarify any final questions.

2

ONBOARDING DOCUMENTATION

Collect necessary documentation from the client, including access to their accounting software, previous financial statements, tax returns, and any other relevant financial documents.

3

BANK AND CREDIT ACCOUNT INTEGRATION

Assist the client in setting up or granting access to their bank and credit accounts for transaction imports, which will streamline the bookkeeping process.

By following these steps, we can ensure that new clients are smoothly integrated into our bookkeeping business, setting the foundation for a successful and long-term partnership.

WHAT TO EXPECT

COLLABORATIVE BOOKKEEPER

This package offers a comprehensive solution to get your books up to date and maintained, featuring meticulous financial record-keeping, monthly reconciliations, and regular financial reports to keep your business finances clear and under control.

- ✓ We take the time to understand your specific requirements and customize our services accordingly.
- ✓ We ensure you're always informed and comfortable with the financial status of your business.
- ✓ Your financial data's security and confidentiality are our top priorities. We employ stringent measures to protect your information at all times.
- ✓ Beyond day-to-day bookkeeping, we provide insights and advice to help optimize your business's financial performance and support your strategic goals.



KICKOFF CHECKLIST

This checklist is designed to guide you through the initial steps of our collaboration



COMPLETE INTAKE FORM

Fill out the Intake Form with detailed information about your business and financial needs.



SIGN THE CLIENT AGREEMENT

This document outlines the terms of our service, confidentiality, and payment terms.



PAY YOUR INVOICE

Submit your payment via your preferred method, such as online payment, bank transfer, or check.



SUBMIT INITIAL DOCUMENTS

Send us any initial financial documents requested, such as previous tax returns, financial statements, and other relevant records.



SCHEDULE KICK-OFF MEETING

This meeting is an opportunity to discuss your business goals, clarify any questions about the onboarding process, and outline the next steps.

PROJECT TIMELINE

WEEK 1

ONBOARDING AND INITIAL ASSESSMENT

Initial review of your financial records by your dedicated bookkeeper. Outline of a customized bookkeeping plan and timeline.

WEEK 2

CLEANUP

Begin cleanup of existing bookkeeping records to correct any discrepancies and ensure accuracy.

WEEK 5

NEW IMPLEMENTATION

Implement streamlined bookkeeping systems and processes, including integration with accounting software and setting up categorization rules.

WEEK 8

FIRST MONTH'S BOOKKEEPING

Execute the first month's bookkeeping tasks, including transaction recording, bank reconciliations, and financial statement preparation.

WEEK 10

FINANCIAL REPORT

Deliver comprehensive financial reports, including profit and loss statements, balance sheets, and cash flow statements.

WHAT'S NEXT

MONTHLY MAINTENANCE

Each month follows a similar structure, with ongoing bookkeeping maintenance, monthly reviews, and the delivery of financial reports.

STRATEGIC SUPPORT

Quarterly strategic reviews to assess financial health, discuss goals, and plan for the future.

AS NEEDED

Support for ad hoc financial queries, tax preparation assistance, and any additional financial management support as requested.



*SETTING GOALS IS THE
FIRST STEP IN TURNING THE
INVISIBLE INTO THE VISIBLE.*



COMMUNICATION



BUSINESS HOURS

Monday - Thursday
10:00am - 4:00pm CST

RESPONSE TIME

Our team is committed to responding to all inquiries within 24-48 hours during regular business hours. For matters requiring immediate attention, we strive to respond within a few hours during business hours.

AVAILABLE CONTACT OPTIONS

Email: Ideal for detailed inquiries, document sharing, and non-urgent communication. It provides a clear record of our conversations and agreements.

Phone Calls: Best suited for urgent matters, immediate decisions, or when a more personal touch is needed.

Video Conferencing: Perfect for comprehensive discussions, face-to-face meetings, or when visual presentations are involved.

RESOURCES & TOOLS



CLIENT PORTAL ACCESS

Our secure client portal gives you 24/7 access to your financial documents, reports, and the status of your bookkeeping.



EDUCATIONAL CONTENT

We offer a range of educational resources designed to help you understand bookkeeping and financial management.



FINANCIAL TOOLS

Access to a variety of financial templates and tools, such as budget spreadsheets, invoice templates, and expense trackers, to help streamline your business operations.



SOFTWARE TRAINING

For clients using financial management software, we provide training sessions to help you get the most out of your bookkeeping software.

FREQUENTLY ASKED QUESTIONS

How often will my books be updated?

Your books will be updated on a regular basis as per the package you choose, typically monthly. This ensures that your financial records are always current and accurate.

Can I switch bookkeeping packages?

Yes, you can switch packages if you find that a different package better suits your business needs. We recommend discussing any required changes with your dedicated bookkeeper.

How do I provide my financial documents to you?

Financial documents can be uploaded securely through our client portal or sent directly to your dedicated bookkeeper via email, depending on the nature of the documents.

How can I access my financial reports?

Financial reports are available through our secure client portal. You will receive regular reports based on your selected package, and additional reports can be requested from your bookkeeper.

LOOKING FORWARD TO WORKING WITH YOU!

We are dedicated to providing you with the highest level of service and support, ensuring that your financial management needs are met with professionalism and care.

We believe in building strong, lasting relationships with our clients, and we look forward to the opportunity to contribute to the success and growth of your business. Thank you for choosing us

*THE SECRET OF GETTING
AHEAD IS GETTING STARTED.
LET'S GET STARTED!*



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BILLING TERMS

RETAINER FEE

A retainer fee is a pre-paid amount that clients pay upfront before any work starts. This fee can be set as a fixed amount covering a specific period or a certain number of hours of bookkeeping services.



UPFRONT MONTHLY PAYMENTS

This billing approach requires the payment for services to be made at the beginning of each service period. By doing so, we can dedicate our resources and focus entirely on delivering exceptional results without administrative interruptions.



THANK YOU

THANK YOU FOR CHOOSING US. WE ARE EXCITED TO EMBARK ON THIS JOURNEY WITH YOU AND LOOK FORWARD TO CONTRIBUTING TO YOUR BUSINESS'S SUCCESS.