

CHOOSE THE RIGHT LEVEL OF SUPPORT

Package Comparison Guide

Compare the bookkeeping, reporting and financial-insight support included at each level - then choose the package that best fits how your business operates today.

DESIGNED FOR

Mortgage, real estate and property-management businesses that need dependable books and clearer financial information.

CLARITY BOOKKEEPING • GROWTH INSIGHTS • VISION INSIGHTS

Starting packages are based on transaction volume, account complexity, entities, reporting requirements and service scope.

THE THREE LEVELS

Begin with the support your business needs now.

Every package begins with a dependable bookkeeping foundation. The difference is how much reporting depth, analysis, planning and ongoing financial guidance is added.

BUILD A DEPENDABLE FOUNDATION

Clarity Bookkeeping

Starting at \$750/month

For businesses that need accurate monthly books, reconciliations and standard financial reporting.

- Monthly transaction categorization
- Bank and credit-card reconciliations
- Monthly Profit & Loss and Balance Sheet
- Monthly close and bookkeeping questions
- Basic AP support available
- Compliance services available as add-ons

UNDERSTAND PERFORMANCE

Growth Insights

Starting at \$1,500/month

For growing businesses that need stronger reporting, cash-flow visibility and structured financial review.

- Everything in Clarity
- Consolidated or management reporting
- Cash-flow analysis and simple budgets
- Customized financial dashboards
- Quarterly strategy reviews
- AP coordination available

PLAN WITH GREATER VISIBILITY

Vision Insights

Starting at \$3,000/month

For leadership teams that need advanced KPIs, forecasting and an executive-level reporting rhythm.

- Everything in Growth
- Advanced KPI dashboards
- Forecasting and benchmarking
- Executive reporting and trend analysis
- Quarterly strategic review
- Annual planning support

GOOD TO KNOW

Package scope is finalized after discovery. Greenkey can recommend the most practical starting level and identify any add-on services separately.

FEATURE COMPARISON

Compare the support at a glance.

Use this table to identify the reporting and decision-support level your team is currently missing.

Support area	Clarity	Growth	Vision
Monthly bookkeeping and reconciliations	Included	Included	Included
Monthly Profit & Loss and Balance Sheet	Included	Included	Included
Month-end close and bookkeeping support	Included	Included	Included
Basic accounts-payable support	Available	Available	Available
Consolidated or management reporting	-	Included	Included
Cash-flow analysis	-	Included	Included
Simple budgets	-	Included	Included
Customized financial dashboard	-	Included	Included
Quarterly strategy review	-	Included	Included
Advanced KPI tracking and dashboards	-	-	Included
Forecasting and benchmarking	-	-	Included
Executive reporting	-	-	Included
Annual planning support	-	-	Included
Compliance and licensing support	Add-on	Add-on	Add-on

“Available” services depend on scope and may be quoted separately. Final deliverables and cadence are confirmed in the service agreement.

CHOOSING YOUR FIT

Which description sounds most like your business?

CHOOSE CLARITY IF...

Your priority is getting the books current, reconciled and consistently closed each month.

A strong fit when leadership needs dependable standard financial statements but does not yet require dashboards, forecasting or structured strategy reviews.

CHOOSE GROWTH IF...

You need help understanding performance - not only recording transactions.

A strong fit when the business needs cash-flow analysis, management reporting, simple budgets, dashboards and a recurring review conversation.

CHOOSE VISION IF...

Leadership needs a forward-looking financial rhythm.

A strong fit when decisions require advanced KPIs, forecasting, benchmarking, executive reporting and more strategic planning support.

STILL DECIDING?

The best package is based on the complexity of the business and the decisions leadership needs to make - not simply company size.

NEXT STEP

Start with a focused discovery conversation.

We will review your current bookkeeping process, systems, reporting needs and priorities, then recommend the most appropriate level of support.

Schedule at calendly.com/info-greenkeyaccounting

Greenkey provides bookkeeping, reporting and compliance-aware support. Tax preparation, legal advice and tax advice are not provided.