A FOUNDATION. A CLEARER VIEW. A FORWARD PLAN.

Choose your next level of clarity.

Start with the support your business needs today. Add deeper insight and planning as your decisions become more complex.

MORTGAGE BROKERAGES / REAL ESTATE FIRMS / PROPERTY MANAGEMENT

01

Clarity

Bookkeeping

$750

starting / month

Clean books. A dependable close.

- Monthly bookkeeping and reconciliations
- Profit & Loss and Balance Sheet
- Documented close and organized open items

Explore Clarity

02

Growth

Insights

$1,500

starting / month

Turn monthly results into useful context.

- Everything in Clarity
- Cash flow, budget comparisons and core KPIs
- Monthly insight and priority review

Explore Growth

03

Vision

Insights

$3,000

starting / month

Bring a forward view to leadership.

- Everything in Growth
- Forecasts, scenarios and a custom KPI dashboard
- Executive reporting and leadership reviews

Explore Vision

Starting prices vary with accounts, entities, transaction volume, systems and reporting needs. Your proposal defines the deliverables and cadence.

KNOW WHAT IS INCLUDED

Compare the support.

Each level builds on the last. Optional work is agreed and quoted before it begins.

Support	Clarity $750+ / mo	Growth $1,500+ / mo	Vision $3,000+ / mo
Monthly bookkeeping and reconciliations	**Included**	**Included**	**Included**
Profit & Loss and Balance Sheet	**Included**	**Included**	**Included**
Cash-flow reporting	Not included	**Included**	**Included**
Budget-to-actual analysis	Not included	**Included**	**Included**
Trends and core KPIs	Not included	**Included**	**Included**
Monthly insight review	Not included	**Included**	**Included**
Forecasting and scenarios	Not included	Optional add-on	**Included**
Custom dashboard or scorecard	Optional project	Optional project	**Included***
Executive and multi-entity reporting	Not included	When scoped	**Included**
Specific compliance filings	Optional add-on	Optional add-on	Optional add-on

* Vision includes the custom dashboard/scorecard defined in your agreed deliverables. Additional dashboards, complexity, cleanup and specific filings are separately scoped. A dashboard can also be a standalone project.

Start with a conversation.

Bring your systems, entities, the condition of your books and the decisions you need to make. We will discuss a scope that fits.

Book a free discovery call

View the online comparison

Bookkeeping and reporting. Payroll services and income-tax preparation or filing are not offered. Legal and tax advice are not provided.