

Sheffield Accounting & Finance Services

Quarterly Accounting Oversight Plans

Quarterly Accounting Oversight ensures your financial records remain accurate, compliant, and structurally sound so you can make confident business decisions and maintain tax efficiency.

What's Included:

- Financial statement review (Profit & Loss, Balance Sheet)
- Account balance verification
- Error and discrepancy identification
- Adjusting entry recommendations
- Strategic financial insights and performance review
- Quarterly tax strategy awareness and optimization recommendations

Plan Options:

Essential Quarterly Oversight — \$375 per quarter

Review of up to 3 financial accounts, standard review, and recommendations.

Growth Quarterly Oversight — \$525 per quarter

Review of up to 6 financial accounts, expanded review, trend analysis, and written recommendations.

Advanced Quarterly Oversight — \$750 per quarter

Review of 7+ financial accounts or higher complexity, advanced analysis, and strategic recommendations.

Requirements:

- Bookkeeping must be current and up to date
- Cleanup services are not included
- Quarterly Accounting Oversight does not replace bookkeeping
- Strategic tax recommendations included, but does not replace full CFO advisory