




Bette Hochberger  
CPA, CGMA

# Fractional CFO *Packages*

*Experience a boutique CPA firm specializing in wealth-building for business owners through strategic tax planning, Fractional CFO Services, and more.*



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# About Us

We are a CPA firm dedicated to empowering individuals and business owners to grow their wealth through ***tailored fractional CFO services, comprehensive tax preparation, and strategic tax planning.***



## Why Choose Us?

Partner with a dedicated team of professionals who truly understand your unique challenges and are committed to driving your business growth.

# Our Team

*We help clients achieve their dreams with a diverse team delivering top-notch advice and results. As trusted financial advisors, we bring a well-rounded perspective to every engagement.*



**Bette Hochberger, CPA, CGMA**  
*Founder*



**Emily Gutierrez**  
*Accountant*



**Nick Giannavola**  
*Tax Accountant*



**Yaylin Martinez**  
*Head of Operations*



**Kaylee Adams**  
*Marketing Manager*



**Jordan Guthrie**  
*Director of Client Success*



**Jose Hernandez**  
*Controller*



**Alex Hochberger**  
*COO, CMO, MBA*

# Fractional CFO

## *Packages and Pricing*

### Gold

*\$6,045/month*

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Our Gold Package, our best offering, delivers comprehensive accounting solutions, including everything in Silver plus weekly reconciliations, CPA consulting calls, and quarterly tax planning. Enjoy seamless support with paperless payables and full IRS audit assistance for accurate financial insights and strategic guidance.

### Bronze

*\$1,040/month*

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Our Bronze Package offers monthly accounting with a 4-week close, bank reconciliations, and paperless payables. Enjoy annual financial statements, payroll preparation, and quarterly CPA consultations, plus support for IRS notices, document storage, and sales tax and 1099 filings.

### Silver

*\$2,415/month*

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Our Silver Package includes everything in Bronze plus monthly reconciliations and financial statements. Benefit from monthly CPA consultations, meetings with a Controller, and bi-weekly payroll processing, ensuring your business stays informed and on track.

### Starter

*\$659/month*

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Our Starter Package offers quarterly reconciliation with a 4-week close, annual financial statements, and payroll preparation. It includes quarterly CPA consultations, support for IRS notices, secure document storage, and help with sales tax and 1099 filings.



# Gold Package



*Elevate your financial strategy with our Gold Package, designed for businesses that require the highest level of support and insights. Building on our Silver Package, this offering features premium accounting services, including weekly reconciliations and financial statements, along with enhanced strategic and tax support. Enjoy peace of mind with dedicated audit assistance, ensuring your business is well-prepared and informed.*

## Includes EVERYTHING IN SILVER, plus:

- ✓ *Weekly reconciliation of all financial accounts with a 1-week post-month-end closure.*
- ✓ *Weekly CPA consulting calls for in-depth analysis and strategic planning.*
- ✓ *Weekly financial statements for the most current insights.*
- ✓ *Quarterly tax planning meetings to refine tax-saving strategies.*
- ✓ *Continuous support with paperless payables and accounting software integration.*
- ✓ *Full support during IRS audits, including correspondence response and representation (excluding 'audited financials').*

# Silver Package



*Transform your financial management with our Silver Package, offering enhanced support and strategic insights for businesses ready to grow. This package builds on our Bronze services, providing accelerated accounting, monthly financial reporting, and dedicated consultations with our expert CPA and Controller. Rest easy knowing your financial health is expertly managed every step of the way.*

## Includes EVERYTHING IN BRONZE, plus:

- ✓ *Monthly reconciliation of financial accounts with a 2-week post-month-end closure.*
- ✓ *Provision of monthly financial statements for timely insights into your business's financial performance.*
- ✓ *Monthly CPA consultations for tax planning and business reviews.*
- ✓ *Monthly meetings with a Controller, including daily email support for ongoing guidance.*
- ✓ *Bi-weekly payroll processing and tax filing for necessary forms.*
- ✓ *Advanced tax strategies and recommendations for retirement plan optimization.*



# Bronze Package



*Streamline your financial management with our Bronze Package, designed for businesses seeking essential accounting services. This package ensures timely and accurate financial reporting through monthly accounting activities, including bank reconciliations and payroll document preparation. With dedicated support and compliance assistance, you can focus on growing your business while we handle the details.*

## Key Services:

- ✓ *Complete accounting activities with a 4-week close, ensuring all financial information is up-to-date.*
- ✓ *Monthly reconciliation of bank and credit card statements.*
- ✓ *Preparation of annual financial statements, including Income Statement, Balance Sheet, and Cash Flow.*
- ✓ *Payroll document preparation for a compliant payroll process and annual business tax return.*
- ✓ *Quarterly CPA consultations for strategic tax planning and advice.*
- ✓ *Expert assistance with IRS notices for peace of mind in tax matters (excluding audits).*

# Starter Package



*Kickstart your financial management with our Starter Package, tailored for businesses needing essential accounting support. This package includes quarterly reconciliations and financial statement preparation, ensuring your financial information is accurate and compliant. With dedicated support and guidance, you can focus on your business while we handle the accounting details.*

## Key Services:

- ✓ Quarterly reconciliation of financial accounts with a 4-week close.
- ✓ Diligent support for annual business tax return.
- ✓ Review and preparation of annual financial statements.
- ✓ Quarterly CPA consultations for tax planning.
- ✓ Payroll document preparation for compliance.
- ✓ Expert assistance with IRS notices (excluding audits).





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# Contact Us *Today*



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