



SIMPLIFIED PARTNERS

PRICING & SERVICES GUIDE

This guide will walk you through our offerings and
give you the information you need to make the best
decisions for your business!



THANKS FOR BEING HERE!

nice to meet you



I'M MARIA. YOUR
BUSINESS FINANCE
BESTIE.

My team & I are here to help you grow and scale your business by ensuring accurate financials AND efficient systems that will help grow & scale your business.

Many business owners know how to market & sell, but they get bogged down by the operations and financial processes that can take a toll on profits.

We help you install easy yet effective operating & financial systems to grow your profit and your impact for years to come.



OUR 4 PILLARS

WE WOULD LIKE FOR YOU TO KNOW HOW WE ARE DIFFERENT FROM OTHER FIRMS OUT THERE. WE ILLUSTRATE THIS WITH OUR 4 PILLARS

HUMAN CONNECTION

One thing that will never change is the power and importance of human connection. We facilitate this with community building, business development assistance and through our care and attention to detail.

TECH-FORWARD

We don't simply rely on what is here now, but the latest in technology, AI and automation. We teach the latest information to our members and clients so they can take advantage of all technology has to offer.

HOLISTIC BUSINESS GROWTH

As business and financial strategists, we care not only for the bottom line but the operations that led to that result.

We help our members and clients build a holistic, visible business that leads to increased performance.

SIMPLICITY

We strive to offer transparency and simplicity in all we do. Life is too short to get bogged down in financial and operational complexity. We strive to rid the small business from admin confusion so they can make a larger impact on their families and the world around them.



OFFERINGS

1 Simplified Accounting Services

Starts at \$995.00 Monthly

2 CFO Planning Intensive

\$1,295.00 per half-day session

3 CFO Profit Accelerator

\$5,900 6-Week Program

DISCLAIMER

Each of our service packages contain a different amount of 1-to-1 assistance. The Simplified Accounting Services package is an ongoing monthly accounting service that is priced based on your business size and complexity. After booking your Intensive session or completing your 6-week Profit Accelerator, we can build a custom plan for ongoing assistance should that be requested by you.



SIMPLIFIED ACCOUNTING SERVICES

ACCURATE. ORGANIZED. ACTIONABLE.

Your e-commerce business deserves more than data entry — it deserves a financial system built for growth.

Our Accounting Services provide accurate books, clear reporting, and meaningful insights so you can make confident financial decisions every month.

Whether you need cleanup, ongoing bookkeeping, or controller-level oversight, we tailor our support to your business needs.

What you'll receive:

- Monthly Bookkeeping & Reconciliation
- Keep your accounts, bank feeds, and credit cards reconciled and accurate.
- Customized Chart of Accounts Setup
- Align your financial data with how your business actually operates.
- Monthly Financial Reports
- Receive Profit & Loss, Balance Sheet, and Cash Flow reports presented in plain language — no jargon.
- Quarterly Financial Reviews via Zoom



CFO PROFIT ACCELERATOR

A 6-WEEK INTENSIVE TO UNCOVER, OPTIMIZE AND
ACCELERATE YOUR BUSINESS PROFIT

Turn your business into a profit-producing system in just six weeks –
guaranteed to uncover more value than your investment

The outcomes of this service include:

- Comprehensive Financial & Operational Diagnostic
- Bi-Weekly CFO Strategy Sessions
- Custom 90-Day Profit Action Plan
- Between Session Support
- ROI Guarantee

OUR WEEK BY WEEK FOCUS:

1. Profit & Systems Diagnostic
2. Cash Flow Optimization
3. Operational Streamlining
4. Pricing & Margin Strategy
5. Forecasting & KPIs
6. Profit Action Plan

You will walk away with a complete financial and operational audit of your business, a 90-day roadmap to implement for immediate profit growth, streamlined processes to save you time and free up stress, and the financial visibility and metrics that drive confident decisions!



CFO PLANNING INTENSIVE

START BUILDING YOUR SYSTEMS WITH OUR 4-HOUR FOCUS

The CFO Planning Intensive is a one-time, 4-hour strategy session for business owners who want to build (or rebuild) their accounting systems, workflows and financial processes - the right way.

What we'll cover:

- A customized agenda will be built prior to the intensive based on information sent in by you with your priorities & biggest issues
- Accounting System Setup or Restructuring
- Workflow Design (the WHO-WHAT-WHEN)
- Operational & Financial Process Creation
- Custom Implementation Plan

THIS IS PERFECT FOR...

1. ☒ Businesses transitioning from DIY to outsourced accounting
2. ☒ Startup businesses who want to get their operating and accounting systems setup right from the start
3. ☒ Owners who want to simplify, automate and scale their operations

GET ORGANIZED. GAIN CONTROL. BUILD A FINANCIAL
SYSTEM THAT SUPPORTS YOUR GOALS.



COMMUNICATION

OFFICE HOURS

Our office is open from 8:00am to 5:00pm CST Monday-Friday.

CLIENT COMMUNICATION

One thing that sets our company apart is our care and concern for the client experience. You are entrusting your finances and your business to us, and we take that seriously. We want to ensure you have a great experience with us.

Our client communication differs by service package. We have email support and a client portal available for our accounting clients and a customized Slack channel for our CFO Profit Accelerator clients.

All messages received will be returned by the next business day.

For accounting-only clients who would like a customized Slack channel, this can be added on as a monthly upgrade.

FAQ'S



Q: Can I Change my service package?

A : Yes, you can at any time! Email us at support@simplifiedpartners.com with the changes you would like



Q: How do we get started working together?

A: Once you sign your proposal, we send over a Welcome email with an onboarding form. This must be completed in order to move forward.





GET STARTED

right away!

I hope you found one of these packages to be a good fit for you! Please email us at the address below to let us know which package is the right fit for you.

If you're still in the exploration phase or have more questions, no worries at all.

Send any questions you have at:  hello@simplifiedpartners.com