



Dodson Bookkeeping & Notary LLC

New Client Service Request Form

Thank you for considering Dodson Bookkeeping & Notary LLC for your bookkeeping and other needs for your business. We love helping businesses, business owners, and prospective business owners feel organized, supported, and confident with their finances, we offer a variety of services that can be provided to help take the stress and boring work off your plate so you can do what you love, running your business and interacting with clients/customers.

To get started, please select the services from each of the sections starting on the next page that you are interested in or needing to be provided as well as sharing a little more information about you and your business so we have clear idea of what can or needs to be done in order to help you best succeed in running and growing your business.

We look forward to the possible opportunity to work with you and provide help and support for you in the areas of your business that you need most!

What makes us unique compared to other bookkeeping and accounting firms? We don't have set in stone pricing! Here is how we base the pricing of services:

- ◇ Services being provided and frequency in which they are provided
- ◇ The amount of time/labor it would need to complete the services
- ◇ Lastly, it depends on your monthly and yearly revenue and sales numbers



Brett Dodson
QuickBooks Certified ProAdvisor
Notary of the Public, VA



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Please Check the Boxes Beside the Services You Would Like to Have Provided:

Bookkeeping Services:

- Catch-up/Cleaning-up of existing books and records
- Transaction Categorization and Classification, Initial and Recurring Rule Setup
- Bank and Debit/Credit Card Reviews and Reconciliations
- Accounts Payable Services (entering bills, scheduling payments, tracking vendor balances, and receipt entry and coding)
- Accounts Receivable Services (creating invoices, tracking customer balances and payments, and following up on past due invoices)
- Payroll Services (preparing payroll data, coordinating payroll runs, posting payroll entries, and/or running or processing payroll direct deposits and printing checks)
- Financial Reporting (Profit and Loss and Balance Sheets)
- Budgeting and Cash Flow Planning
- QuickBooks Support and Advisory Services
- Job or Class Tracking (tracking profitability by project, location, department, or service type)



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Tax and Compliance Support:

- Year-end prep providing organized reports and summaries for CPAs
- 1099 preparation and support (contractor and temporary labor tracking, summaries, and filings)
- Sales Tax tracking and reporting support
- Business Compliance Support (general organization and guidance)

Systems Setup, Migration, and Integrations:

- QuickBooks Online Company Setup and Migration
- Ramp Setup and Migration (if requirements met, this is a corporate credit card and expense tracking platform that offers credit cards and credit lines for those who qualify, if interested check the box to learn more)



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Training and Coaching Sessions:

- QuickBooks Online Training Sessions (1 week long, then on as needed basis, price varying depending on size of group and scope of training provided, as needed pricing dependent on length of additional training needed)
- Ramp Training Sessions (2 or 3 days of initial training, price varying depending on the size of the group, as needed pricing dependent on length of additional training needed.
- Office Administration Staff Training (the length of this training is dependent on the size of the group being trained and the scope of the training being provided, this training includes workflow training, roles and responsibilities training, SOP creations if needed and tips and advise for best productivity practices to ensure not only is work being done but it is being done in a timely manner.

Business Setup, Registration, and Staying Compliant:

- Assisting in the startup of your own business helping with the registration process and helping with staying on top of necessary compliances to operate and run your business correctly.



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Discounts, Deals, Specials, and Promotions

Listed here are some discounts, deals, specials, and promotions that you could potentially apply to the services provided as well as discounts that you can get through Dodson Bookkeeping and a promotion for signing up and creating an account with one of our partners that we work with to provide the best tools and services to ensure your success in running and growing your business!

~ **Discount on QuickBooks Online Subscription**, if you are looking to migrate to QuickBooks or invite Dodson Bookkeeping to be your Accountant and ProAdvisor we will extend a permanent 30% off your subscription price as long as you have Dodson Bookkeeping as your chosen ProAdvisor.

~ **Ramp Sign On Bonus using Referral, if you qualify for the Ramp Corporate Spending and Expenses Account** using the referral link/code that is provided to you by Dodson Bookkeeping, if your application is approved you will not only be given a minimum of a \$10k business credit line you can use right away but also additional \$500 sign on bonus if approved and on-boarded.

~ **Discount Starting Your Business using Referral Link for Tailor Brands** which helps every step of the way from picking the name of your business if you don't already know to getting you registered in your state you do business, if you use our referral link you can get 20% off the highest tier package AND a \$50 Amazon Gift Card once you have been approved and registered.



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Contact Information Intake

Lastly, we just need a little bit of information from you so that we have all that we need in order to get in touch and see what we can do to help you and provide the services you want and need as soon as possible!

Company/Business Name: _____

Company/Business Address: _____

Main Point of Contact:

Name: _____

Phone: _____ (Office/Main) _____ (Mobile)

Email: _____

Preferred method of contact: _____

Best times to communicate or reach out via call:

Once done please send your completed form to, bdodson@dodsonbookkeeping.services, once your request has been received either my team or myself will take a look at your request and we will reach out to you via phone call at the provided best time to contact by calling.

We look forward to the possibility and the opportunities we could have to work together and provide the best services that you will be satisfied with!



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