

Monthly Bookkeeping Options



Features	Align	Flow	Synergy
Onboarding Meeting	✓	✓	✓
Categorization & Posting Transactions	✓	✓	✓
Customized Chart of Accounts / COA Maintenance	✓	✓	✓
Depreciation Set Up	✓	✓	✓
Bank/Credit Card Account Reconciliation	1-2 Accounts	Up to 4 Accounts	Up to 10 Accounts
Monthly Transactions	75	200	400
Accounting Method	Cash	Modified Cash	Accrual
Check-In Calls	Quarterly	Monthly	Bi-Weekly
Financial Reporting	P&L, Balance Sheet	P&L, Balance Sheet	P&L, Balance Sheet, Statement of Cash Flows, Variance Reports
Custom Financial Reports	None	Up to 2 Reports	Up to 4 Reports
Monthly Reporting Date	20th	15th	10th
Business Advisory Meeting & Financial Review	Annually	Quarterly	Monthly
Email & Phone Support for Routine Questions	✓	✓	✓
Annual Review & Tax Preparation	✓	✓	✓
Vendor Management / 1099		✓	✓
Accounts Receivable Support		✓	✓
Accounts Payable Support			✓
Internal Controls Support (Approval Workflow)			✓
Budget Development			✓
Collaboration With CPA			✓

Add-Ons

Payroll Setup and Support

1099 Filing (Annual Fee)

Systems Integration Setup

Choose **Align** if your bookkeeping is simple and steady, and you mainly need clean, reliable monthly maintenance.

Choose **Flow** if your business is growing or uses multiple platforms and you need deeper monthly review and support.

Choose **Synergy** if your operations are complex or high-volume and you need the most hands-on monthly oversight.