



**Contact Information**  
 Phone: (816) 718-0901  
 Fax: (877) 369-7351  
 Email: rochelle@hugheswalkergroup.com



# Understanding Your Current Systems

**Premium package** - This is the best option for business owners who want the maximum out of their cloud accounting system and identify a setup that will provide key metrics so they can make the best business decisions based going forward. This also allows us to ensure your system is ready to move.

**Comprehensive package** - This is our most popular option because you get valuable information regarding your current systems, general advice and we'll even recommend changes on key items in your current system. This also allows us to ensure your system is ready to move.

**Essential package** - This option is required for those business owners who are moving from a current cloud or desktop system. This also allows us to ensure your system is ready to move.

	Premium package	Comprehensive package	Essential package
Review company setup	✓	✓	✓
Review Chart of Accounts	✓	✓	✓
Review bank reconciliations for the last 12-month period	✓	✓	✓
Review credit card reconciliations for the last 12-month period	✓	✓	✓
Review digital wallet reconciliations for the last 12-month period	✓	✓	✓
Review bank transactions for the last 12-month period	✓	✓	✓
Review credit card transactions for the last 12-month period	✓	✓	✓
Review digital wallet transactions for the last 12-month period	✓	✓	✓
Review accounts receivable for the last 12-month period	✓	✓	✓
Review accounts payable for the last 12-month period	✓	✓	✓
Review customer list information	✓	✓	✗
Review vendor list information	✓	✓	✗
Review undeposited funds for open items	✓	✓	✗
Review item lists	✓	✓	✗
Review Classes	✓	✓	✗
Review 1099 Detail	✓	✓	✗
Review Items (Products & Services)	✓	✓	✗
Review Journal Entries	✓	✗	✗
Review payroll processing	✓	✗	✗
Review payroll tax returns	✓	✗	✗
Review payroll tax payments	✓	✗	✗
Review Billable Time	✓	✗	✗
Review Sales Tax Setup	✓	✗	✗
Review Recurring Templates	✓	✗	✗
Review Sales Tax Returns	✓	✗	✗
Review Sales Tax Payments	✓	✗	✗
Review Restricted/Non-Restricted Funds	✓	✗	✗
Review Inventory	✓	✗	✗
Identify alternative workflows to improve timeliness of information	✓	✗	✗
<b>Your One-time Investment</b>	<b>\$ 779</b>	<b>\$ 429</b>	<b>\$ 299</b>