

# Simple Numbers® Consulting & Services Outline

Navigating today's financial current can be a challenging adventure - and we're here to help you navigate through the rough patches to smoother seas. We believe that it is small businesses and entrepreneurs like you that champion market growth and anchor the economy. We're here to supply you the data you need to maximize profitability - not just for today, but for sustainable profitability over the long haul.

We believe that it is important to match your needs and objectives with the right level of services. We understand that each business has its own unique opportunities and challenges; with that in mind, we have listed below an outline of our basic service packages to get you started.

*"I am far from being a finance guru but this was hands down the most eye-opening experience I have had during my entrepreneurial journey. From the day I picked up the phone until now it has simply been a great experience and I will not hesitate to recommend your team to every entrepreneur I know."*  
 - Iannique Renaud, CEO  
 Renaud Lifestyle Products

## Our Process

Our Simple Numbers® planning session process aims to assist entrepreneurs in creating a planned outcome for their business. Once the strategic session is complete, the relationship is setup for ongoing services. The result being a vested interest by both parties in creating or growing a profitable, wealth generating business capable of making an impact.

### **\*Full Day, On-Site Strategic Planning Session**

Starting at: \$6,000 + Travel  
 \$5,000 if you come to us!

*\*Does not include pricing for Greg Crabtree*

**Who is it for:** Business owners (Executive Team may be included)

**Objective:** To conduct a full day company strategic planning session breaking down the company financial direction in the morning followed by a strategy session in the afternoon.

**Deliverables:** Customized Simple Numbers Cash Flow Model®, Review of financial data utilizing Simple Numbers concepts, Company KPI Scoring, Review of Financial Statements, Labor Efficiency Concepts, Thinking Model, Reporting Rhythms, and Financial Scenarios. Strategic Planning content including: Development of Values Filter, D.O.S (Dangers, Opportunities, Strengths) Exercises, Priorities Development & Timeline of Execution, Long-term Vision Plan

### **\*Remote Planning Session Two 2-hour Virtual Meetings**

Starting at: \$4,000

*\*Does not include pricing for Greg Crabtree*

**Who is it for:** Business owners (Executive Team may be included)

**Objective:** For those doing 3<sup>rd</sup> party strategic planning and/or just looking to analyze your data in the Simple Numbers format then the remote session offers a flexible solution to getting a financial breakdown of the business along with financial modeling.

**Deliverables:** Customized Simple Numbers Cash Flow Model®, Review of financial data utilizing Simple Numbers concepts, Company KPI Scoring, Review of Financial Statements, Labor Efficiency Concepts, Thinking Model, Reporting Rhythms, and Financial Scenarios

### **For More Information**

[mike.maxson@crbcpa.net](mailto:mike.maxson@crbcpa.net)

<https://simplenumbers.me/>

**256.704.0620**



## \*Business Reviews & Services – After Completion of Initial Session

Consulting Services Monthly Price Range	Monthly Business Review Starting at: \$950 - \$1150	Hybrid Business Review Starting at: \$750 - \$950	4x Business Review Starting at: \$550 - \$750
Monthly Cash Flow Model	✓	✓	
Monthly Consulting Call	✓		
Quarterly Cash Flow Model <i>(For 4x, every 3 months, every quarter or 4 times per year)</i>			✓
Quarterly Consulting Call <i>(For 4x, every 3 months, every quarter or 4 times per year)</i>		✓	✓
Salary Surveys	✓	✓	✓
Personality Profile Assessments	✓	✓	✓
Tax Planning	✓	✓	✓
Quarterly Tax Projections	✓	✓	✓
(1) Annual Consulting Service	✓	✓	✓
(2) Accounting & Bookkeeping Support	✓	✓	✓
<b>(3) Tax Services</b>			
Individual Tax Return	Federal and <b>one</b> state individual tax return: \$900 - \$1,100		
Individual Tax Return w/Sch. C	Federal and <b>one</b> state individual tax return with one schedule C: \$1,200 - \$1,800		
1065 Partnership Tax Return	Federal and <b>one</b> state partnership tax return: \$2,200 - \$2,600		
1120S Corporate Tax Return	Federal and <b>one</b> state S-Corp tax return: \$2,200 - \$2,600		
1120 Corporate Tax Return	Federal and <b>one</b> state C-Corp tax return: \$2,400 - \$2,800		
<b>Outsourcing (Bookkeeping) Services</b>			
Weekly/Bi-weekly Tasks Rates: \$60/hour	- Entering and paying bills; recording deposits; payroll; weekly reconciliations; two week cash flow projection		
Month End Close / Tasks Rates: \$100-\$125/hour	- Final bank and credit card reconciliations; review of monthly transactions; review of balance sheet and P&L; sales tax		
*Any additional weekly/bi-weekly/monthly tasks not listed here would be covered under that respective rate.			
<b>Audit Services</b>			
Please contact us to schedule a call with our Audit Team to provide a review and quote.			

## **Additional Information About Our Services**

\*Price ranges for all consulting services can vary based on the number of locations, additional breakouts, etc.

\*Price for planning sessions may change based on # of companies that are analyzed and/or additional breakouts such as locations, business segments, etc. We will let you know the additional amount during initial consultation.

\*Tax, outsourcing, and audit services are only available if client has completed a planning session

\*Contact us to inquire about audit services

(1) Annual Consulting Service: This service includes unlimited phone and email support from CRB's Consulting Team in regards to a variety of business issues to include but not limited to, hiring, transaction analysis, labor efficiency, and executive compensation.

(2) Basic Accounting & Bookkeeping Support: In many ways similar to the consulting service, our accounting and bookkeeping support offers our clients access to CRB's accounting manager and outsourcing team should any questions or issues arise in the area of accounting and bookkeeping.

(3) Tax Services: Price ranges could be affected by:

- Intricate partnership agreements
- Robust personal investments such as rental property, stock, businesses, farm, etc.
- Additional bookkeeping and/or significant adjustments required
- Multiple locations and/or states - \$500/additional state; \$750/NY & CA
- IRS laws pertaining to your business