

Business Consulting & Accounting

19909 – 64th Ave W. Suite B – 2nd Fl.
Lynnwood, WA 98036

Phone: 206-361-3950

www.Contracting4Profit.com

How We Can Work Together

Dear Business Owner,

Thank you for your interest in Business Consulting And Accounting. This letter will introduce you to our firm and provide you with some idea of who we are and how we may be able to help you.

We will do our best to respect you, your time and your resources by working within the principles of The Strategy of Preeminence which means our clients are under the care and protection of professionals looking out for their best long-term business interests similar to how your physician and/or spiritual advisor supports you in your personal life.

First let me say we are not the right accounting firm for everyone, only a select few will qualify to be invited to work with us and if you do not fit our parameters please do not take it personally. We intentionally look for business owners who have legitimate needs and willing to engage in a fair and open discussion about the issues they are facing and how those issues are impacting their company and themselves personally in order to determine if we are a good fit for each other.

These discussions can touch on sensitive areas of finance, operations and the overall strategy of your company. Rest assured we will keep our discussions confidential and private. It is simply in everyone's best interest to have enough information and understanding so that we can make a mutual decision on whether or not we are a good fit for each other.

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Step #1 – Phone Call

The business owner needs to contact Sharie by phone 206-361-3950 or email sharie@contracting4profit.com and she will chat with you and if appropriate set an appointment for you to meet with her at our office.

Step #2 – Prepare For Your Appointment

Please gather as much of the following items as possible for your first appointment:

1. **Do not organize it, we are professionals, we know what to do with paper!**
We have large desks and can handle everything from a shoebox, file box and all the receipts on the dashboard and hidden under the seat of the truck.
2. Put everything into a box or boxes if needed because there is no such thing as too much paper that needs to be entered into QuickBooks but hasn't been for whatever reason including:
 - a. The government notices, letters, notices, returns need to be filed folder
 - b. The I'm confused and lost about what to do with this stuff folder
 - c. The I don't want to deal with this stuff folder
3. Paperwork, invoices, check registers, receipts, bills, past due notices and anything related to your business that you want to review. Please bring everything you think may remotely be important.
4. Letters, documents and notices from any local, state, federal tax agencies that relate to current tax problems
5. Notes for invoices you need prepared so you can get paid from your customer
6. Copy of your QuickBooks file and administrative password
7. List of questions and notes about the problems you are having and what would your ideal solution look like, sound like, feel like, smell like and/or taste like.
8. Anything else you can think of that is not on this list

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Step #3 – Your In Person Appointment

The business owner must be present at the initial appointment. You are welcome to bring up to six additional guests. Perhaps your bookkeeper, in-house accountant, project manager or whomever you want too.

Here is what you can expect from us:

Sharie needs to understand:

1. The problem in clear and simple terms everyone can understand
2. As much as possible about your situation and your company
3. What solutions have been tried, what is working and not working
4. How the problems began in the first place
5. How long they have been going on
6. How it's impacting the company
7. How it's impacting the owners
8. How it's impacting the staff
9. If it's important enough to invest in a solution
10. How you make decisions to bring in someone like us in to fix problems

We provide professional accounting services for business owners who appreciate value. Please understand Sharie is not here to make a sales pitch because we sort for clients. We do not sell to business owners looking for a one-size-fits-all low price leader.

Finally, if either of us determines there's not a fit, Sharie will end the interview.

Warm Regards,

Sharie DeHart

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Located In Lynnwood's SnoKing Contractors Center

19909 – 64th Avenue W. Suite B – 2nd Floor Lynnwood, WA 98036

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CONSTRUCTION ACCOUNTING SPECIALISTS

Do You Need Just A Little Help?

Meet Sharie – To Discuss Your Issues!

Bring It All – Your QuickBooks File

“The Stuff” – Letters, Receipts



206-361-3950

sharie@contracting4profit.com

Contractors Bookkeeping Services - Invoicing

- QuickBooks New File Setup, Clean-Up, Create Invoices
- Customize QuickBooks Reports / Item Lists / Job Costing
- Outsourced Accounting / Payroll / Sales Tax / Qtr Reports
- Welcome Paper / Emails / PDFs / Reports - 3rd Party Apps

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