

Bookkeeping Quote Comparison Worksheet

Use the same portfolio information for both bookkeeping firms. Write included, extra, excluded or unconfirmed, then add the relevant detail. Blank does not mean included.

Your business and property types: _____

Number of properties and businesses: _____

Books current through: _____ Cleanup period needed: _____

Most important reporting need: _____

Ongoing service	Proposal A	Proposal B
Bookkeeping firm and quote date		
Properties and businesses covered		
Pricing basis and monthly minimum		
Categorization and bank and credit card reconciliation		
Property manager statements, loans, refinances and closing documents		
Property and business profit and loss reports and business balance sheet		
Detailed rehab tracking and additional reports		
Reporting schedule and conditions for delivery		

Compare Starting Costs and Your Role

Carry forward the same two bookkeeping firms. Record a specific answer or the question you still need answered.

Starting work and responsibilities	Proposal A	Proposal B
Historical cleanup period and one time price		
Onboarding, software and any other charges		
Authorized sources the bookkeeping firm uses		
Documents and answers you must supply		
How questions are combined and followed up		
Excluded services and pricing for added properties or activity		
Confirmed monthly total and what it covers		
Confirmed starting costs separate from monthly service		

Resolve these before choosing

- 1. _____
- 2. _____
- 3. _____

My preferred proposal and why: _____
