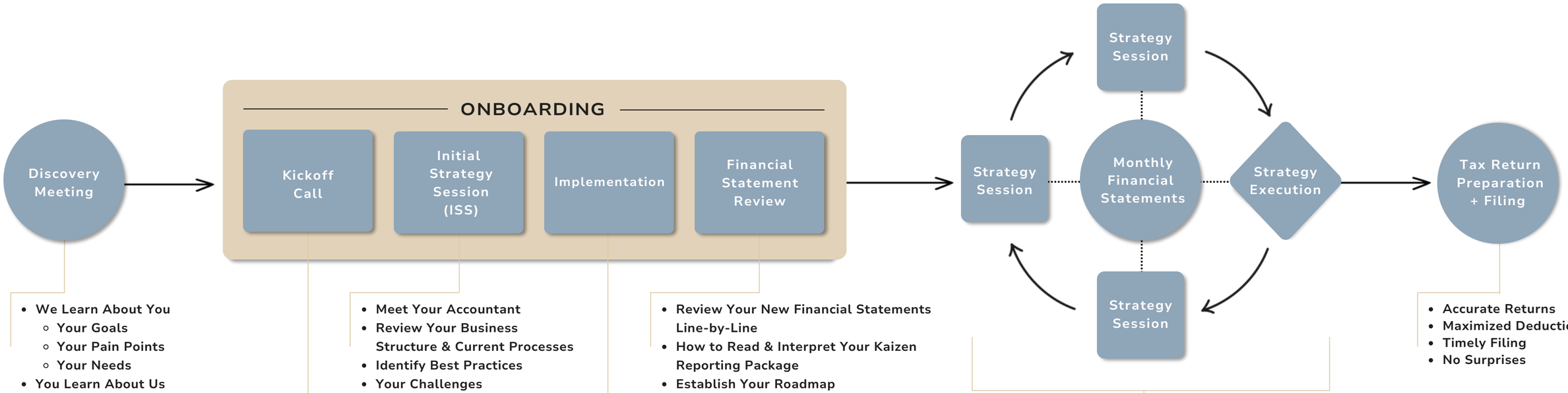
KAIZEN
CPAs + ADVISORS

THE KAIZEN DIFFERENCE



- We Learn About You
  - Your Goals
  - Your Pain Points
  - Your Needs
- You Learn About Us
  - The Tools
  - The Process
  - What You Can Expect

- Meet Your Accountant
- Review Your Business Structure & Current Processes
- Identify Best Practices
- Your Challenges
- Your Future
- How We'll Help

- Review Your New Financial Statements Line-by-Line
- How to Read & Interpret Your Kaizen Reporting Package
- Establish Your Roadmap
- Celebrate the End of Onboarding!

- Accurate Returns
- Maximized Deductions
- Timely Filing
- No Surprises

- Meet the Onboarding Team
- Review What We'll Provide
- Review Tech Stack
- Qount Portal Training
- Walk Through *The Kaizen Difference*
- "Help Us Help You"
- Schedule Future Meetings

- Bank Access Call
- Software Training
  - Dext/Ramp
  - QBO
- QBO Review
- Backwork
- Coding Review Call

- In By the 10th, Out By the 25th
- Continual Communication
- Year-Round Tax Optimization Planning
- Strategy Execution

SMALL BUSINESS PACKAGE | PLUS LEVEL