



## We Grow with You

Congratulations on your new independent RIA firm! As you navigate the first few months of your young RIA firm, there are a lot of important legal and business setup requirements. Like most startups, costs tend to outweigh revenue at this stage and spending money on professional advice feels like a ‘want’ and not a ‘need’.

At Elevate CPA Group, we can work with your breakaway RIA firms as you grow and offer flexible pricing to help manage costs whilst getting the support and advice you need:

	Services	0-6 Month Startup Period	7-12 Months from Fully Established	1yr +
Starting at \$500 per mo.	Growth Strategy Meeting	X		
	Books & Records Rule <ul style="list-style-type: none"> <li>• Bookkeeping</li> <li>• Setup QuickBooks* online with Chart of Accounts</li> </ul> *QuickBooks discounted rate	X		
	Tax Entity Review and Setup	X		
	Firm Tax Return (preparation)	X		
	Responsiveness to Questions	X		
	Elevate Independence Alliance access for business setup	X		
Starting at \$1,000 per mo.	Q1: Plan for upcoming years tax and business goals		X	
	Q2: Review financials and goals, setup succession planning KPIs, growth goals and address issues		X	
	Q3: Truelytics implementation, review and set goals, outline steps for achievement		X	
	Q4: Tax planning and following year planning and achievement plans		X	
Starting at \$1,500 per mo.	Future growth strategy meeting and agree on goals, support and implementation. May or may not include the following services: <ul style="list-style-type: none"> <li>• Annual Analysis of the Firm Valuation</li> <li>• Fractional CFO</li> <li>• Accounting + Tax Return Preparation</li> <li>• Cash Flow Planning and Projections</li> <li>• Managed Fee Calculation Review</li> <li>• Industry Benchmarking</li> <li>• Compensation Planning</li> <li>• Personal Financial Statements</li> </ul>			X

Take advantage of our expertise to support your breakaway RIA firm. Let's talk about how we can grow and be successful together.



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