



ACCOUNTING SERVICES CHECKLIST

Purpose

To review the scope of financial reporting needs and to provide an integrated management proposal.

Requirements

Please provide the following key items required for a full scope and proposal:

- Copies of current financial reports produced
- Back up (in dropbox or similar cloud service) of general ledger
- Most recent bank account statements for all accounts
- Previous year federal tax return
- Please share the following information
 - Type of accounting software in use: _____
 - Fiscal year end date for accounting: _____
 - How many signatures required for check: _____
 - When are financial reports required to be complete: _____

Follow-up

Once all the checklist items are collected please email all the contents from above, including a shared link to dropbox or cloud service, at info@xmigrowth.com.

For any additional questions, please call us at (615) 248.9255.

