



Quotes – Hourly Package vs. Monthly Package Prepared for Law/Paralegal Firms

***Small to Medium Business Focused***

*You run your business, we run your books!*

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**55 Village Centre Place, Mississauga  
Ontario, L4Z 1V9, Canada**

# YOUR ACCOUNTING DEPARTMENT

## Your Accounting Department

Your Accounting Department (YAD Ontario) offers two service options; (1) standard **hourly rate** of \$60.00 along with a \$1,500.00 monthly retainer; or (2), **monthly package** (based on required hours of work) subject to discounts of **20% to 60% in savings**.

### OPTION 1: HOURLY PACKAGE

Option 1: Hourly Package	
<input type="checkbox"/> Selected	
<b>Hourly rate:</b>	\$ 60.00
<b>Monthly Retainer*:</b>	\$ 1,500.00
<b>Monthly Services</b>	Based on checklist. See full summary of services in the following table, Service, and make your selections.
<b>Add-on:</b>	
QBO Bootcamp-style training for business owners (one-time fee)**	\$ 50.00
Select your add-on: <input type="checkbox"/> Selected	
* Retainer must be issued on the first day of the month and will be adjusted based on total hours of provided service.	
** Service is provided upon client's request/consent.	

### OPTION 2: MONTHLY PACKAGE

Choose one of the following six packages

Option 2: Monthly Package						
	Starter Package	Bronze Package	Silver Package	Gold Package	Pearl Package	Diamond Package
Select your Package	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected
<b>Monthly Hours</b>	4 hours	10 hours	20 hours	40 hours	60 hours	80 hours
<b>Total Monthly Investment</b>	\$ 200.00	\$ 400.00	\$ 800.00	\$ 1,600.00	\$ 2,400.00	\$ 3,000.00
<b>Monthly Retainer *</b>	\$ 200.00	\$ 400.00	\$ 800.00	\$ 1,600.00	\$ 2,400.00	\$ 3,000.00
<b>Monthly Services</b>	Based on checklist. See full summary of services in the following table, Services, and make your selections.					
<b>Monthly Discount</b>	20%	50%	50%	50%	50%	60%
<b>Monthly Savings</b>	\$ 40.00	\$ 200.00	\$ 400.00	\$ 800.00	\$ 1,200.00	\$ 1,800.00

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	Starter Package	Bronze Package	Silver Package	Gold Package	Pearl Package	Diamond Package
<b>Hourly average rate/additional hours**</b>	\$ 54.00	\$ 51.00	\$ 49.20	\$ 47.40	\$ 45.60	\$ 43.80
<b>Hourly average discount</b>	10%	15%	18%	21%	24%	27%
<b>Printing Charge Discount**</b>	30%	40%	50%	60%	70%	80%
<b>Add-ons:</b>						
QBO Bootcamp-style training for business owners (one-time fee) **	\$ 50.00	\$ 50.00	\$ 40.00	\$ 30.00	\$ 20.00	\$ 10.00
Select your add-on:	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected	<input type="checkbox"/> Selected
<p>* Should the retainer not be used throughout the monthly term of service, the remainder will be either applied towards next month of service, or credited to the Client</p> <p>** Service is provided upon client's request/consent</p>						

## PRINTING:

Standard Printing fees		
Client is responsible for all additional printing charges based on the following schedule upon client's request		
Printing	Letter	Legal
<b>Standard Colour</b>		
1 - 499	\$ 0.41	\$ 0.62
500 - 999	\$ 0.40	\$ 0.60
1,000 - 2,999	\$ 0.35	\$ 0.55
3,000 - 4,999	\$ 0.28	\$ 0.38
5,000 - 7,999	\$ 0.23	\$ 0.29
8,000+	\$ 0.18	\$ 0.23
<b>Standard Black &amp; White</b>		
1 - 499	\$ 0.12	\$ 0.13
500 - 999	\$ 0.09	\$ 0.10
1,000 - 9,999	\$ 0.05	\$ 0.06
10,000 - 19,999	\$ 0.05	\$ 0.06
20,000+	\$ 0.04	\$ 0.05

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## SERVICES

Please make as many selections as you need within 2 last columns in the **Services** table below:

1. Check off the **Service** that you require
2. **Identify number of accounts** that you have for each required service – *i.e. 1 Accounts Receivable, 5 Accounts Payable, 10+ General Expense Posting, 3 Credit Cards Reconciliation, etc.*

Services		Check Service		Identify # of Accounts (1-10+)
	<b>ALL SERVICES LISTED BELOW</b>	<input type="checkbox"/>	<b>All Services</b>	
<b>Service 1</b>	Accounts Receivable	<input type="checkbox"/>	Service	
<b>Service 2</b>	Accounts Payable	<input type="checkbox"/>	Service	
<b>Service 3</b>	General Expenses Posting	<input type="checkbox"/>	Service	
<b>Service 4</b>	Credit Cards Reconciliation	<input type="checkbox"/>	Service	
<b>Service 5</b>	Banks Reconciliation	<input type="checkbox"/>	Service	
<b>Service 6</b>	HST/GST - subject to province	<input type="checkbox"/>	Service	
<b>Service 7</b>	EHT	<input type="checkbox"/>	Service	
<b>Service 8</b>	Payroll Processing	<input type="checkbox"/>	Service	
<b>Service 9</b>	Payroll Liability Tracking	<input type="checkbox"/>	Service	
<b>Service 10</b>	T4, T4A, T5	<input type="checkbox"/>	Service	
<b>Service 11</b>	Month-end	<input type="checkbox"/>	Service	
<b>Service 12</b>	Year-end	<input type="checkbox"/>	Service	
<b>Service 13</b>	Financial Statements:	<input type="checkbox"/>	Service	
<b>Service 14</b>	- Income Statement	<input type="checkbox"/>	Service	
<b>Service 15</b>	- Balance Sheet	<input type="checkbox"/>	Service	
<b>Service 16</b>	- Cash Flow Statement	<input type="checkbox"/>	Service	
<b>Service 17</b>	- Accounts Receivable Aging Report	<input type="checkbox"/>	Service	
<b>Service 18</b>	- Accounts Payable Aging Report	<input type="checkbox"/>	Service	
<b>Service 19</b>	- Trust Listing Report	<input type="checkbox"/>	Service	
<b>Service 20</b>	- Trust Receipts Journal	<input type="checkbox"/>	Service	
<b>Service 21</b>	- Trust Disbursements Journal	<input type="checkbox"/>	Service	
<b>Service 22</b>	- Client's Trust Ledger	<input type="checkbox"/>	Service	
<b>Service 23</b>	- Trust Transfer Record	<input type="checkbox"/>	Service	
<b>Service 24</b>	- General Journal	<input type="checkbox"/>	Service	
<b>Service 25</b>	- General Receipts Journal	<input type="checkbox"/>	Service	
<b>Service 26</b>	- General Disbursements Journal	<input type="checkbox"/>	Service	
<b>Service 27</b>	- Client's General Journal	<input type="checkbox"/>	Service	
<b>Service 28</b>	- Fees Book	<input type="checkbox"/>	Service	
<b>Service 29</b>	- Bank Reconciliation Report	<input type="checkbox"/>	Service	
<b>Service 30</b>	- Trust Bank-Client Reconciliation Report	<input type="checkbox"/>	Service	
<b>Service 31</b>	9A Forms	<input type="checkbox"/>	Service	
<b>Service 32</b>	Retainer Top-Up Requests	<input type="checkbox"/>	Service	
<b>Service 33</b>	Administration Service & Support:	<input type="checkbox"/>	Service	

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Services		Check Service		Identify # of Accounts (1-10+)
<b>Service 34</b>	- Answer phone calls on your behalf	<input type="checkbox"/>	Service	
<b>Service 35</b>	- Create email on behalf of client and answer emails related to finances	<input type="checkbox"/>	Service	
<b>Service 36</b>	- Process customers' credit card payment	<input type="checkbox"/>	Service	
<b>Service 37</b>	- Physical organization of files	<input type="checkbox"/>	Service	
<b>Service 38</b>	Other admin duties (please specify):	<input type="checkbox"/>	Service	
	_____			

## SOFTWARE

Please make selections within 2 last columns in the **Software** table below:

1. Check the **Current Software** that you are currently using
2. Check the **New Software** that you would like to migrate to (if needed)

Software:		Check Current Software	Check New Software
<b>Software 1</b>	- Clio/QBO	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 2</b>	- Cosmolex	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 3</b>	- PClaw	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 4</b>	- ADP CAN	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 5</b>	- ADP US	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 6</b>	- WagePoint	<input type="checkbox"/> Software	<input type="checkbox"/> Software
<b>Software 7</b>	- Other (please specify):	<input type="checkbox"/> Software	<input type="checkbox"/> Software
	_____	<input type="checkbox"/> Software	<input type="checkbox"/> Software

**For further information and package options, please contact us:**

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**YAD Ontario**  
Your Accounting Department Inc.

[info@yadontario.com](mailto:info@yadontario.com)  
[www.yadontario.com](http://www.yadontario.com)  
Operating since 2007

# YOUR ACCOUNTING DEPARTMENT

If you identified Option and Services for your bookkeeping needs, you may provide the following information to help us prepare a Services Agreement and service your books. You may email this document to your YAD Contact.

**Company Name:** \_\_\_\_\_

**Contact Name:** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Phone #:** \_\_\_\_\_

**Date:** \_\_\_\_\_

## **IMPORTANT:**

It is important to note that this is not an official services agreement. Information provided and identified in this document is for sole purpose of estimation and summary of services provided by Your Accounting Department (YAD). Should the company listed above wish to retain YAD services, an official services agreement will be presented and signed.