

Fiscal Fitness Plan

Service Request Form

2011 CPA/Controller Service Plans

Annual Revenues (for the year 2010)		Basic Plan Annual Fee
Level I	Up to \$50,000	<input type="checkbox"/> \$600
Level II	Up to \$150,000	<input type="checkbox"/> \$1,100
Level III	Up to \$300,000	<input type="checkbox"/> \$1,700
Level IV	Up to \$500,000	<input type="checkbox"/> \$2,100
Level V	Up to \$1,000,000	<input type="checkbox"/> \$2,900
Level VI	Up to \$5,000,000	<input type="checkbox"/> \$3,900

**New Client Set-Up Fee: \$250 due at the time of sign-up (non-refundable).
Please fax your payment with this form to 888-553-3170.**

All Fiscal Fitness Plan fees are based on services provided for the calendar year 2011 financial activity and are paid in monthly installments based on the number of months remaining in the calendar year. Fees are payable on the 5th day of each month. The final installment will be due on December 5th. Customized pricing is available for new ministries with less than six months of financial activity during the year 2011. **All payments are non-refundable and may not be applied toward other services.**

Technical Support Plan

Technical support may be purchased up to 2 hours (annually through December 31, 2011). Additional Technical support may be purchased in two-hour increments. You may purchase Technical Support anytime during the year. Full payment must be made in advance. New technical support packages purchased after September 30th will expire December 31, 2011.

- 2 Hours of Technical Support - \$150.00 4 Hours of Technical Support - \$300.00

Client Information

Company Name _____

Street Address _____

City/State/Zip Code _____

Telephone # _____ Fax # _____

Senior Pastor's Name _____

Primary Contact Person _____ Phone _____

Email Address _____

of Employees _____ # of Members _____ 2010 Annual Revenues: \$ _____

Which Membership Software does your organization currently use? _____

Which Accounting Software will you use during 2011? Include Year and/or Version #.

Which Windows Version do you use? ___ XP Home Edition ___ XP Pro Edition ___ Vista ___ Windows 7 ___ Mac

Has Acrobat Reader 7.0 or higher been installed? ___ Yes ___ No Do you have high speed internet access? _____

Authorized Signature

Date

Fiscal Fitness Plan

2011 Fiscal Fitness Service Plan Rates

Annual Revenues (for the year 2010)		Annual Fee
Level I	Up to \$50,000	\$600
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Level III	Up to \$300,000	\$1,700
Level IV	Up to \$500,000	\$2,100
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Each Service Plan Includes the Following:

- Quarterly Financial Check-Ups
- Quarterly Payroll Returns (Annual Federal Payroll Returns for Level 1, if applicable)
- Year End Compliance Check-Up
- W-2 Preparation
- 1099 Preparation
- Close the Books for Year End
- Minister's Compensation Check-up (if applicable).
- Internal Controls Check-up
- Policies and Procedures Check-Up
- Up to 4 hours of Technical Support (Phone/Email/Fax support for assistance with reconciling accounts, initial training, setting-up the books, strategic planning, compliance questions, etc).
- Free access to our Church Finances 101 E-Learning Courses

Technical Support

Additional technical support may be purchased in 2 hour increments of \$150 (for 2 hours). Clients using software other than Peachtree may require additional tech support billings for setting-up the books, initial training and on-going support.

Client Requirements

Complete Church Finances 101 E-Learning Courses once per year and fax certificate of completion to W&A.
Purchase and Maintain Peachtree Complete Accounting or QuickBooks Pro accounting software.
Purchase and Maintain Membership Database Software
Maintain High Speed Internet Access for Remote Desktop Support & Check Email Regularly
Purchase and Maintain Anti-Virus Software
Complete tasks assigned on Monthly & Quarterly Checklists
Complete tasks assigned through our client work center on a timely basis.