

Bookkeeping Client Expectations

As a valued client of Lomness CPA Services we want to take a moment to remind you of the expectations regarding bookkeeping services to ensure our continued collaboration runs smoothly.

Timely Submission of Documents

Please remember to provide all necessary financial documents (bank statements, credit card statements, loan statements, etc.) in a timely manner. The quicker we receive your documents, the faster we can provide you with your monthly financial statements.

The most efficient way for us to receive statements is for you to set us up as an additional user (with viewing access) with your online bank or lender. This is our preferred method to assure timely reconciliations. Our office can also send you an invitation to enroll with LedgerSync. LedgerSync will fetch your bank feed data and import it to our secure dashboard.

Ensure that all documents provided are accurate and complete.

Communication

Keep lines of communication open regarding any changes in your financial situation, business operations, or concerns you may have. Your communication is crucial in ensuring we meet your needs effectively.

We will promptly provide you with your financial statements monthly. Please respond within **7 business days** to emails requesting assistance identifying transactions. These emails will be sent you via email with a subject "Ask the Client_Your Company Name".

If you have any questions or require clarification on our bookkeeping services, don't hesitate to ask. We're here to help you understand and navigate your financial processes better.

Authorization & Permissions

Ensure that necessary authorizations and permissions are up to date for us to access relevant financial accounts, software platforms, and other tools required for bookkeeping purposes. Please respond timely to our inquiries on authorizations lapsing.

Feedback

Your feedback on the bookkeeping process is invaluable to us. Please continue to provide input and suggestions for improvement to enhance our service delivery.

Thank you for your ongoing partnership. We greatly appreciate your cooperation in meeting these expectations, which enables us to serve you better. Should you have any questions or need assistance, please do not hesitate to contact us at Accounting@LomnessCPA.com.