QUOTE SHEET

Volume, then complexity, then the named floor.

Volume, then complexity, then the named floor. Tax-season surcharge hits project work inside a wall — not the monthly retainer.

Fieldstone Advisory

Montgomery County, Texas · Fieldstone Advisory · Montgomery County

AI drafts. Human review. Then send. We are not a CPA firm. We are not a law firm. Circular 230 did not get an AI exception.

THIS FILE

Transition, then Friday Close

300 transactions / month · Established service · 8 months dark · 4 accounts · 1 entity · ap · payroll 6-20

Inventory / job costing

$1,500 / mo

On calendar (29+ days) · no rush on the retainer. Project now $6,500.

Named floor $1,500. Industry math $1,300. Mill floor $600 — we do not match it. Start $1,000.

Catch-up at 2–3× live monthly (ceiling): $24,000–$36,000. Founding Friday Close $6,500 is the wrap.

ProAxis published: $6,400–$9,200 at $800–$1,150 / month of backlog. That is the comparable market, not 2–3×.

BANDS

Transaction volume

TXNS	FEE	HOURS	PROFILE
0–49	$150–$250	2–4	Solo / pre-revenue
50–100	$250–$400	3–5	Freelancer, SMLLC
100–250	$400–$650	5–8	Small service
250–500	$600–$1,000	8–12	Established service
500–1000	$1,000–$1,800	12–18	Restaurant, growing ecommerce
1000–2500	$1,800–$3,000	18–30	High-volume retail
2500+	$3,000–$5,000	30–45	Multi-channel / multi-entity

RULES

Base the year, not a quiet month. Season buffer is 18% — already in the retainer.

Job costing, accrual, entities, marketplace, S-Corp — these move the tier. Payroll is a dollar add.

Catch-up for a year behind is 2–3× monthly × months. The $6,500 is founding wrap, and only on calendar.

Inside 30 days: +20% on the project. Inside 14: +40% and the wrap is off. Inside 7: decline.

Target $85 / hr, 40–70% gross margin. Invoice after the call. No card.