SUR ACCOUNTING

FOR CPA FIRMS · FINANCIAL ADVISORS · INVESTMENT STRATEGISTS
REFERRAL PARTNER SHEET

We keep the books. You keep the advice.

SUR Accounting is a remote, cloud-based **bookkeeping firm based in California**, staffed by QuickBooks Online ProAdvisors who serve business owners nationwide — the contractors, clinics, restaurants, realtors, salons, law firms, and non-profits you already work with. We keep their numbers accurate, reconciled, and tax-ready, then package those numbers into plain-language reports that send **prepared clients straight to you**.

THE PARTNER ADVANTAGE

Built to send work to you.

Section 7 of every report turns the period's numbers into specific, data-backed questions your client brings to their next meeting — **with you**. The data is already assembled. The appointment is already motivated. You stay the trusted advisor; we do the bookkeeping behind it.

HOW THE HANDOFF WORKS

1. **We Keep the Books**
   Monthly bookkeeping, reconciliations, plus catch-up & clean-up of messy files.
2. **We Build the Reports**
   Custom Quarterly & Year-End packages, written in plain language for the owner.
3. **Section 7 Raises Questions**
   The numbers become specific questions for each advisor — already backed by data.
4. **Your Client Books the Meeting**
   A prepared, motivated client arrives ready to talk.
   CPA · Advisor · Strategist

THE REPORTS WE HAND OFF

Quarterly Financial Reporting Package

AVG. REPORT LENGTH IS 15 PAGES · PROVIDED QUARTERLY

- **Period Snapshot**
  Headline KPIs with QoQ and YoY trends.
- **P&L, Balance Sheet & Cash Flow**
  Full statements with plain-language reading guides.
- **Spending Analysis & Trends**
  Month-by-month view of cost-saving opportunities.
- **What the Books Show For Tax**
  CPA-ready reference figures, no guesswork.
- **Section 7 — Advisor Questions**
  Data-backed questions your client brings to you.
- **Action Items**
  Ranked by urgency and impact, ready to act on.

Year-End CPA Tax Reporting Package

AVG. REPORT LENGTH IS 20 PAGES · PROVIDED ANNUALLY

- **Year In Review**
  Headline KPIs with full-year YoY comparison.
- **Full-Year P&L**
  Quarterly columns plus the balance sheet.
- **Cash Flow**
  Health-vital ratios and annual spending analysis.
- **What the Books Show For Tax**
  CPA-ready figures, including §199A / QBI.
- **Section 7 — Advisor Questions**
  For the CPA, financial advisor, and strategist.
- **Action Items**
  Tied to filing deadlines, plus next-year focus.

WHY ADVISORS PARTNER WITH SUR

Never a Competitor
Bookkeeping only — no tax returns, no financial advice. That work stays yours.

Clients Arrive Prepared
Clean QuickBooks files & CPA-ready figures, with review items already flagged.

Recurring Touchpoints
Every quarter and at year-end, our reports tee up a reason to meet.

Always Audit-Ready
Reconciled, clean files that cut your prep work and risk.

Let's set up a referral partnership.

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Free Consultations · Transparent Monthly Pricing · Cancel-Anytime Guarantee

Sure beats guessing.

REFER A CLIENT

SEE OUR REVIEWS

Disclaimer: SUR Accounting is a bookkeeping company only and is not a licensed or registered payroll provider, CPA, EA, CTEC tax preparer, or financial advisor. All reports are for informational purposes and are based on data in the client's QuickBooks file and information the client provides. This material is not tax, legal, financial, or compliance advice; always consult licensed professionals before relying on it. Sample figures shown in our package previews are demo data.