

Pricing Proposal Template for Accounting Firms (Neutral)

This pricing template is designed for accounting firms to provide structured, automation-friendly pricing for bookkeeping and accounting clients. You can adjust tiers, add details based on client size, volume, and engagement scope.

Service Packages

Package Tier	Included Services	Client Type	Price Range (Monthly)
Starter / Basic	<ul style="list-style-type: none">• Monthly bookkeeping• Bank reconciliation (1-2 accounts)• Basic financial reports	Solo traders / Small businesses	£300 - £750+
Growth / Standard	<ul style="list-style-type: none">• Weekly bookkeeping• AP & AR management• Inventory tracking (if applicable)• Tax-ready statements	Growing SMEs	£800 - £1,500+
Advanced / Premium	<ul style="list-style-type: none">• Dedicated support• Advanced reporting + KPIs• Forecasting & budgeting• Quarterly tax preparation	Mid-large businesses	£1,800 - £3,500+
Enterprise / Custom	<ul style="list-style-type: none">• Full finance department outsourcing• Systems automation + integrations• Dedicated account manager	High-volume or complex businesses	Custom Quote

Automation & Efficiency Enhancements

- Document automation and AI-enabled data capture can reduce manual work.
- Offer automation add-ons for bank feeds, invoice processing, or AP/AR workflows.
- Adjust pricing for clients involving cleanup, migrations, or catch-up work.

Customization Options

Pricing can vary depending on:

- Transaction volume
- Number of bank/credit accounts
- Software used
- Payroll complexity
- Level of reporting & frequency
- Tax requirements

Prepared for: _____

Proposal Date: _____

Valid Until: _____