



FIRST VALLEY
ACCOUNTING

**LET'S WORK
TOGETHER:
COMPANION FIRM
OFFERING**

**From
Ryan Minner**

MANAGING DIRECTOR
FIRST VALLEY ACCOUNTING

SUMMER 2024



ABOUT US



OUR COMPANY

We are accounting experts and QuickBooks ProAdvisors that specialize in providing financial reconciliations, monthly financial statement creation, and transaction processing for growing businesses.

Many of our clients often have straight-forward accounting practices dealing with non-complex transactions. For these clients seeking a streamlined complete financial solution, we have developed our baseline companion firm package starting at \$50/hour. This industry-leading offering provides you with the financial expertise you need at an unbeatable price.



OUR MISSION

We believe reliable bookkeeping and financial statements are critical to company success. And with over 340,000 accountants leaving the profession from 2019-2023, we understand companies are facing unprecedented accounting personnel challenges.

A lack of accounting personnel results in the neglect of critical accounting tasks and an increase in financial statement errors.

LET US HELP YOU.

ABOUT YOU



What is a Companion Firm

Are you struggling to support your existing clients?

We understand your clients have increasing demands. We can support you by executing recurring tasks or carved-out projects that will allow you to focus on higher judgment areas or client-facing tasks.

All work and deliverables are subject to our processes and reviews for a blended rate of \$50/hour billed to the Companion Firm. Our team typically reports to the Companion Firm rather than the End Client. This allows for the timely completion of tasks to support you as you continue to support your client.

Our Companion Firm agreements are typically structured as:

- S: 10 hours/week
- M: 20 hours/week
- L: 30 hours/week

Are you unable to service new clients?

Due to increasing accountant personnel shortages, companies are seeking external accounting services more than ever before. Many of these clients are seeking services that we can deliver at a competitive price and quality. If they reach out to you, can can reach out to us!

All work and deliverables are subject to our processes and reviews. Our team would fully own the End Client relationship. This allows you to focus on your existing clients.

Example agreement: Companion Firm refers New Client to First Valley based on nature and scope of work. If we move forward, we remit 20% of gross fees collected during the first 6 months to the Companion Firm.

HOW CAN WE HELP YOU?

OUR CAPABILITIES



Day-to-day Accounting Tasks



Managerial Financial Packages



Monthly Reconciliation Procedures



CFO Services

YOUR COMPANION FIRM TEAM MEMBERS

TEAM LEADER

RYAN MINNER

Managing Director / Client Management

RYAN RIFE

Managing Director / Operations & Delivery

CHAD REED

Managing Director / Risk & Quality

HANNAH JUNIO

Senior Bookkeeper

RICO DOCA

Bookkeeper

MACEL MENDOZA

Bookkeeper

LIZ VARGAS


Bookkeeper

JEN FUENTES

Project Manager

JAMIE SANCHEZ

Executive Assistant

 hello@firstvalleyaccounting.com

 www.firstvalleyaccounting.com