

Edj Consulting Group

Policies & Procedures

2023

This is an overview of all operational policies and procedures for Edj Consulting Group and all Edj Consulting Group clientele.

Office hours: Monday - Thursday 12:00 pm - 5:00 pm eastern standard time

This does not mean I do not work on weekends or evenings. So, you may see work performed in the audit log or emails come through outside of office hours. This simply is a communication window where meetings can be scheduled and communications may be returned.

All communications must be held via email or scheduled conference call.

No personal cell phone calls or texts will be accepted.

All consulting requests have a 3 business day turn time for acknowledgement..

Client to Consultant

All client requests need to be acknowledged within 4 business days or a reminder will be sent.

Consultant to Client

Please remember to keep communications respectful. Failure to do so will result in your consulting services being terminated immediately waiving all rights to a 30 day written notice of cancellation and retainer will be forfeited.

Services will be halted if invoices are not paid within the agreed upon billing terms found in your consulting agreement. Services will not resume until all open invoices are paid in full. A payment plan can be arranged if needed.

If you would like an itemized billing statement attached with your invoices please submit a request to emily@edjconsultinggroup.com. Allow one billing cycle for changes to go into effect. I do not do this typically as bookkeeping and payroll services are fairly straight forward and there is an internal audit log.

Billing Breakdown example: bookkeeping hours + payroll service hours + \$120.00 payroll processing charge + number of reconciliations = total amount billed.

1 hour per account reconciliation

This breakdown is an example of a client who has full service bookkeeping and payroll

Retainer: An upfront retainer is charged to secure Edj Consulting Group services. This retainer must be paid in full before any services are rendered. This retainer covers any invoices left unpaid or client service terminations within the agreed upon service term window outlined in the Consulting Agreement.

Consulting Agreement: The consulting agreement must be completed in full and signed before any services are rendered. This agreement is a protection for the Business Owner as a Client and for Edj Consulting Group as the Consultant.

No Response: I view no response as a response. Therefore, if no communications are returned within 30 days, without notice, your contract will be canceled and service term cancellation fees will be applied. Edj Consulting Group is a boutique and well desired firm. In order to continue operating at optimal levels I can only stay committed to clients who are committed to themselves.

Collections: Any and all unsettled invoices will be sent to collections after 90 days past due. To avoid collections you may set up a payment plan. Email emily@edjconsultinggroup.com for arrangements. Unsettled debts will be sent to collections immediately with receipt of a "refusal to pay". Refusal to pay may be emailed, text SMS, post letter, said in a meeting or phone call.

Consulting Agreement Cancellation: In the consulting agreement is a service term outlined, typically one year. A 12 month service term ensures we go through at least one tax season together. Early termination must be in writing and given with a 30 day notice. Cancellation of service will result in a \$500 fee or forfeit of service retainer.

Chargebacks: If a Edj Consulting Group client attempts to dispute any previously paid invoices, all chargeback fees, time spent and costs will be added to the invoice. A written letter, copy of consulting agreement, payment authorization form, and all communications and past invoices will be sent in as a rebuttal against any and all chargeback claims. If the client's bank awards the chargeback, disputed invoices and all costs associated will be sent to debt collections for recovery.

Holidays & Occasions I am Out of Office:

New Year's Day, Valentine's Day, St. Patrick's Day, Summer Solstice, Mother's Day, September 19th, October 6th, Thanksgiving, Halloween, Winter Solstice, December 25th - January 5th

The benefits of a bookkeeper are typically not immediate or tangible, as I provide a service and not a product. This is why open, consistent, and honest communication is key to a positive and ongoing working partnership. Not only are the fees incurred by hiring Edj Consulting Group tax deductible, but the benefits of my hard work shine during tax season. Typically saving my clients substantially on their tax liabilities by maximizing deductions, while also increasing profits on an average of 16% per year.

Welcome to Edj Consulting Group