STONE BUSINESS CONSULTANCY- PACKAGE INFO SHEET

Financial Strategy & Bookkeeping Package Info Sheet

Overview- Our Financial Strategy & Bookkeeping Package helps businesses better understand, manage, and plan their finances to support stability, profitability, and long-term growth. We work alongside business owners to provide practical financial guidance, strategic planning support, bookkeeping coordination, and tailored recommendations that help improve financial confidence and business decision-making.

From budgeting and cash flow planning to pricing strategies, bookkeeping support, and financial forecasting, this package is designed to help businesses gain greater control over their financial position while building stronger foundations for sustainable growth. Where bookkeeping support is required, Stone Business Consultancy can coordinate and refer clients to trusted referral partners to ensure businesses receive the most suitable bookkeeping and financial administration support for their needs.

Who this package is for-

- Sole traders wanting greater confidence managing business finances
- Small businesses needing budgeting, bookkeeping, and cash flow support
- Growing businesses wanting stronger financial planning and strategy
- Businesses wanting guidance with pricing and profitability
- Organisations needing support understanding financial performance
- Business owners wanting practical financial insights and bookkeeping support to assist decision-making

What's Included-

- Initial 50 minute Financial Strategy & Bookkeeping advisory session
- Review of current financial systems, bookkeeping processes, budgeting, and cash flow management
- Tailored financial planning and business strategy recommendations
- Guidance regarding pricing structures and profitability planning
- Support with budgeting and cash flow forecasting
- Assistance identifying operational and financial improvement opportunities
- Coordination and referral support for bookkeeping services where required

- Guidance regarding financial goal setting and business growth planning
- Email/phone support between sessions as agreed to by the client
- Ongoing support to improve financial understanding, bookkeeping systems, and business performance

Monthly Structure- Each month includes a 50-minute strategy and support session focused on reviewing business finances, bookkeeping processes, cash flow, budgeting priorities, profitability, and operational planning. During this time, tasks and recommendations may include financial planning discussions, pricing reviews, budgeting adjustments, bookkeeping coordination with trusted referral partners where appropriate, business strategy support, and other agreed financial and bookkeeping support services as per our service agreement with you.

Key Outcomes-

- Improved understanding of business finances and cash flow
- Stronger bookkeeping, budgeting, and financial planning processes
- Better confidence making financial and operational decisions
- Improved pricing structures and profitability awareness
- Reduced financial stress and greater business clarity
- Practical financial strategy and bookkeeping support tailored to your business goals

Why this Package works- This package combines strategic financial guidance with practical bookkeeping coordination and business support, allowing business owners to better understand and manage the financial side of their operations without feeling overwhelmed by the complexity of financial planning and administration. We provide tailored support designed to strengthen long-term business sustainability and profitability while ensuring businesses have access to trusted referral support for specialised bookkeeping services where required.
Where appropriate, Stone Business Consultancy can assist with coordinating bookkeeping support through trusted referral partners to ensure clients receive reliable and suitable bookkeeping and financial administration services aligned with their business needs.

Investment- Casual advisory sessions and ongoing Financial Strategy & Bookkeeping support are available. Pricing may vary depending on business size, financial complexity, bookkeeping requirements, and the level of strategic support required. A tailored recommendation will be provided following an initial consultation.