

## **BOOKKEEPING SERVICES AGREEMENT (2025)**

This Agreement is made on the \_\_\_ day of \_\_\_\_\_, 2025, between:

### **Bookkeeper:**

**A. Gerry Bookkeeping & Admin**

Phone: 604.537.4924

GST Registration No.: 770087120 RT0001

### **Client:**

Address:

Email:

Phone:

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## **1. Services**

The Bookkeeper agrees to provide bookkeeping services which may include, but are not limited to:

- QuickBooks Online Training and Administrative Services / Consultation
- Recording and categorizing financial transactions
- Reconciling bank and credit card accounts
- Preparing reports, statements or payroll entry (if applicable)
- Coordination with the Client's accountant as required

All services will be performed in accordance with generally accepted bookkeeping standards and applicable Canadian tax laws.

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## **2. Hourly Rates (3 hours minimum per day):**

- Remote Work on clients' files: \$30.00 per hour + GST
  - Face to face / Consultation / In-Person / In-Office Work: \$35.00 per hour + GST
  - Cancellation Policy: Due to scheduling requirements, we require a minimum of 24 hours' notice for cancellations. A \$50.00 service charge will apply to any appointment cancelled with less than 24 hours' notice.
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## **3. Payment Terms**

- **Invoices** will be issued through **QuickBooks Online**.
- **Payment is due upon delivery** of services or receipt of invoice, whichever comes first.
- Payment will be requested by **e-transfer** from **A. Gerry Bookkeeping**
- Invoices will include a summary of hours worked and services performed.
- A **late payment fee of 2% per month** may apply to overdue balances over 30 days.

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**4. Schedule and Communication**

Work will be performed according to a mutually agreed schedule between the Bookkeeper and the Client. The Client will provide timely access to all required financial records, systems, and supporting documents.

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**5. Confidentiality**

The Bookkeeper agrees to maintain strict confidentiality with respect to all financial and business information obtained from the Client. Information will not be shared or disclosed to any third party without written consent, except as required by law.

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**6. Independent Contractor**

The Bookkeeper is an independent contractor, not an employee of the Client. The Bookkeeper is responsible for all business expenses, taxes, insurance, and statutory remittances related to their services.

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**7. Term and Termination**

This Agreement is effective for the **2025 calendar year** and will continue until terminated by either party with **seven (7) days' written notice**. All work completed up to the date of termination will be invoiced and payable upon delivery.

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**8. Limitation of Liability**

The Bookkeeper's total liability for any claims arising from this Agreement shall not exceed the total fees paid by the Client for the services rendered.

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**9. Acknowledgment**

Both parties acknowledge that they have read, understood, and agree to the terms of this Agreement.

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**Bookkeeper Signature:** \_\_\_\_\_

**A. Gerry Bookkeeping & Admin**

**Date:** \_\_\_\_\_

**Client Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_