QUICKBOOKS CONSULTING, ONBOARDING, AND EDUCATION AGREEMENT

This Agreement is entered into and made effective as of ____________________, by and between:

Provider: ____
Address: ____
Email: ____

And

Client: ____
Address: ____
Email: ____

1. SCOPE OF SERVICES

The Provider agrees to perform professional QuickBooks consulting, onboarding, and training services as detailed below:

- **System Implementation & Onboarding:** Configuration of QuickBooks account settings, chart of accounts setup, and integration of initial bank and credit card feeds.
- **Data Migration:** Import of historical financial data, customer lists, vendor profiles, and outstanding balances up to __________ prior periods.
- **Education & Training:** Tailored instruction sessions covering workflow management, invoicing, expense tracking, and basic financial reporting.
- **Post-Implementation Support:** Access to troubleshooting and advisory services for a period of __________ days following the initial setup.

2. CLIENT RESPONSIBILITIES

To facilitate the timely delivery of services, the Client agrees to:

- Provide timely access to necessary financial records, bank statements, and legacy accounting software.
- Designate a primary point of contact for decisions, approvals, and scheduling.
- Secure and maintain active subscriptions to QuickBooks software and any required third-party integrations.

3. FEES AND PAYMENT TERMS

The Client agrees to compensate the Provider for services rendered under the following terms:

- **Service Fee:** A fee of $____________________ payable as follows:
  - Deposit of $____________________ due upon execution of this Agreement.
  - Balance of $____________________ due upon completion of the implementation phases.
- **Hourly Consulting Rates:** Any additional consulting or training hours requested outside the original scope will be billed at $ __________ per hour.
- **Invoicing:** Invoices are payable net __________ days from the invoice date. Late payments may be subject to a finance charge of __________% per month.

4. TERM AND TERMINATION

This Agreement shall commence on the effective date and remain in effect until all deliverables are completed, or until terminated by either party. Either party may terminate this Agreement upon __________ days written notice. In the event of termination, the Client shall compensate the Provider for all hours worked and services rendered up to the date of termination.

5. CONFIDENTIALITY AND DATA ACCESS

The Provider acknowledges that during the performance of services, they will have access to non-public financial and operational data of the

Client. The Provider agrees to maintain the strict confidentiality of all such information and will not disclose it to any third party without prior written consent, except as required by law.

6. LIMITATION OF LIABILITY

The services provided under this Agreement are advisory and implementation-based. The Client remains solely responsible for the accuracy of their financial records, tax filings, and business decisions. The Provider shall not be liable for any indirect, consequential, or incidental damages arising out of the use or inability to use the QuickBooks software or implementation configuration.

7. MISCELLANEOUS

This Agreement constitutes the entire understanding between the parties and may only be amended in writing signed by both parties. This Agreement shall be governed by and construed in accordance with the laws of the State of ____________________.

IN WITNESS WHEREOF, the parties hereto have executed this QuickBooks Consulting, Onboarding, and Education Agreement as of the date first written above.

PROVIDER:	**CLIENT:**
______________________________	______________________________
SIGNATURE	SIGNATURE
______________________________	______________________________
PRINTED NAME	PRINTED NAME
______________________________	______________________________
TITLE	TITLE
______________________________	______________________________
DATE	DATE