

FOLLOW  THE WOLF

HOW WE  
WORK  
(with you)

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# WELCOME

## We're in your corner.

Every good journey needs a road map: you don't want to get lost, and you like to know what's coming up around the bend. This guide is designed to give you that. We bring our values of candor, storytelling, grit, and hope into every engagement.

We believe in the truth, because numbers tell the truth. We also believe that stories are the best! We've got lots of stories to share: some funny, some bad, some tragic: but all good. We want to hear yours, too. Your origin story, your back story. How you built your business.

The way we run ours helps you run yours, better.



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Welcome to  
Follow The Wolf



# OUR VALUES



## CANDOR

**No bull, total trust, big authenticity.**

Candor isn't rudeness, harshness, or provocation\*. To us, it's speaking openly, comfortably, and authentically because the relationship is all the better for it. As your client, you need to feel safe to tell us everything and anything – your mistakes, your fears, your stratospheric goals. As your CPA, we'll tell you what you need to hear, not just what you want to hear. No sugarcoating, no mixed messages—just honest communication that leads to smarter decisions and growth all round. In short? We want you to feel safe to be fully you (so we can too!).

\*That's just being a jerk.



## STORYTELLING

**Context is everything.**

Telling stories, good ones, is a big part of how we communicate. Not the circuitous kind, more the perfect-to-explain-a-concept kind. Everyone's got a story to tell too, and knowing your context, where you're coming from, is crucial. We're in the business of improving your livelihood, so knowing how you got here helps us all out. Whether it's breaking down the numbers or explaining a tough concept, we won't just hand you data. We give you the bigger picture. Ultimately, when you're older, wiser, and a little more wrinkly, we want you to tell the best stories to those around you. Ones you're really proud of.





## GRIT

**It pays off to be a little gritty.**

Contrary to popular belief, grit isn't about doing everything yourself. Sure, you might achieve some success that way, but you'll end up exhausted in the process. Instead, we see grit as a determined focus on the bigger picture. It's about knowing when to hire the right people (hello!) and trusting them to execute your vision. It's channeling your energy into leading the business while your team supports it. Grit shouldn't be something you rely on every day; in fact, our goal is for you to need it less and less the more we work together. That's the vision we're striving for.



## HOPE

**Oh, you got this baby.**

In our line of work, we know mistakes and hardships are the best teachers, and the rewards from those experiences? Well, they can be game-changers. Sure, we might come off as oddly positive at times, but that's only because we've seen firsthand what's around the corner. We understand how tackling challenges head-on leads to real growth and genuine success. A few tweaks here and there can make all the difference. As a small business owner, you've got everything you need to live the life you want. It's our job to help you get there (but only if we get to say, "we told you so!" straight after).

## Why this is important for you.

It takes grit to run a business. It really does. Different levels of grit on different days. And hope: not pie-in-the-sky hope, but real hope. The thing that keeps the train moving.

That's how we both do business.





01

# INITIAL REVIEWS

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# INITIAL REVIEWS

## Intake Form Completion

01

Completing this form is mandatory before a meeting takes place; we only schedule meetings after we review your completed intake form.

02

We ask that you complete this form within 2 days of our sending it to you.

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## Intake & Initial Reviews



03

The intake form asks some very simple questions and streamlines our initial conversation. It also allows you an opportunity to examine your pain points and relay them to us.

FILL OUT THE FORM



## QuickBooks Online (QBO) Review

04

A QBO review is mandatory for new clients.

05

We find that reviewing your QBO activity allows us to build a better and more strategic engagement for your company. The more info we know ahead of time, the better engagement we can build for you!

## Prior Year Tax Return Review

06

A prior year tax return review is mandatory for new clients.

07

We find that reviewing your prior year tax returns allows us to build a more strategic tax plan for the current year.



02

**PRICING &  
PAYMENT  
AUTHORIZATIONS**

# PRICING & PAYMENT AUTHORIZATIONS

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## Proposals & Pricing



### Preparation and acceptance of proposal

01

A signed proposal and engagement letter is our green light to start working! Without a signed engagement letter, we cannot begin working with you.

02

We ask that all proposals be signed within 10 days of receiving them if there are no unanswered questions.

### Authorization for payment by ACH or credit card



03

We pull payments based on the info you provide in the payment authorization. This is mandatory before an engagement begins.





03

**SYSTEMS**



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# SYSTEMS

**Invite us to all applications used for your company's finances**

01

We need to be invited to all the applications that you use to run your business, such as your banking and credit card activity, e-commerce applications, and payroll applications. This is critical to our ability to perform a timely month-end close for you.

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**Systems**



**Always use ShareFile for sharing sensitive information and documents**

02

We take your data security very seriously, so we utilize ShareFile to share sensitive information with you.

03

We also ask that you use ShareFile to upload sensitive information for us (voided checks, copies of prior year returns containing your SSN, passwords, etc).





04

**TEAM**



# TEAM



## The team that's got your back

01  
You will be assigned to a team member as your primary point of contact for your monthly accounting.

02  
Assigning you to a team member in our firm ensures that you have a singular point of contact; you never have to guess if you're speaking to the right person!





05

# COLLABORATION

# COLLABORATION

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## Collaboration



### Timely responses between 8:30-4:30 Monday-Thursday

**01**  
We do our best to respond to your emails within the day received, but it may take us up to 24 hours to respond.

**02**  
If we can't respond in a timely manner, we'll let you know so that you don't have to wonder if we received your message. We will not generally respond to you on weekends.

### We will outline our preferred contact methods (email is our default)

**03**  
We prefer to use email for our default contact method, but phone calls and Zoom calls can definitely be scheduled for deeper conversations and meetings.

**04**  
We also use text through our office phone system (not our personal cell phones) if that is easier for quick questions.

### For our engagements to be successful, reciprocity is key

**05**  
We strive to have your financials closed by the 10th of the following month, but if we have unanswered questions, that's not possible. Please try to answer all our questions by the 10th if at all possible to ensure we meet our internal deadlines.

**06**  
It's our goal to provide timely and useful information so you can use that information to make decisions, so we ask that you help us do that by answering our questions in a timely manner.

**07**  
We understand that things happen and everyone gets behind; if we notice that you aren't answering our questions month after month, we will schedule an appointment with you to determine if this engagement is really what your company needs at this time.

**08**  
You will be provided with a deadline to send us your tax information each year. If you miss that deadline, your returns will be extended without question. But if you can meet that deadline, we will do our best to finalize your return on time.



06

**FAQs**



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# FAQs

## TAX

**The tax deadline is April 15. Why is yours 3 weeks ahead of that?**

Rushing creates an ideal environment for mistakes. We hate making mistakes on tax returns (even though sometimes it happens because we're human) and we also hate being rushed, so we do our best to give ourselves enough time to work through everything. We know our deadlines are aggressive, but so is our commitment to doing our best work for you.

**So, you charge monthly but only do estimates quarterly and tax returns annually... why can't I just pay when you do the work?**

We collect monthly payments from our clients because it's more easily budgeted for the client, and we don't ever want to run into a situation where we can't do something for you because you haven't paid us. We realize that we're asking you to pay for something you haven't yet received, and we know that requires a lot of trust. But you also don't pay for your airline ticket after you fly, do you?

## MEETINGS

**How often do we meet?**

We like to hear from you at least once per quarter at a minimum - and more often than that as you have questions! There are times when complicated matters mean it's best to meet monthly or multiple times in one month. And if you go dark on us, we'll reach out and nudge you. Don't worry!

## COMMUNICATION

**What if I have a really small question and I don't want to bother you?**

Your small question could have big consequences...so we encourage you to ask all your small questions!

**Do I have to schedule just a phone call? It's a really quick question.**

I know it sounds "over-structured" to schedule a phone call, but in the era of asynchronous work that is the best way to get what you need. Due to the concentration needed for certain tasks we encourage our team to only check email and voicemail certain times of the day to preserve their brain power. Switching back and forth and living out of email is not the best use of that precious brain power.

## PROPOSAL

**My friend only pays like \$200 a month for accounting. Why are your fees so much higher?**

If that's true, then your friend is getting exactly what they're paying for. We believe that the value we bring to each engagement is enormous, and for that reason, we charge more. You pay us for results, not our time. We want to bring you as much value as possible within the scope of the engagement we provide, so we don't want to deal with hours worked or time spent on something. When you tell your friend what you're paying us, we want you to quickly follow that with "but I get so much more for my money."

## PAYMENT

**What if we don't want to preauthorize a credit card payment or ACH payment method?**

We pull payments because it's easier that way; if invoices are unpaid, our work will stop and we don't want you to get behind. This is mandatory for all our clients.



# THANK YOU

We appreciate you taking the time to read through this document. At **Follow the Wolf**, we're committed to making collaboration smooth, effective, and rewarding.

If you have any questions, need more details, don't hesitate to reach out. If you're ready to take the next step, head to our website and complete our intake form to get started.

[FILL OUT THE FORM](#) 

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