# Compilation Engagement Fee Checkli

Eight things that decide where your compilation quote lands

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Our compilation engagement fee starts from $400 plus applicable taxes, flat. What moves it above that is the state of your books and the size of the business. Work through this before you ask for a quote, and you keep the number near the starting fee.

- [ ] **1 Reconcile your accounts**
  Bank and credit card balances tie to the statements. The biggest driver.
- [ ] **2 Classify transactions sensibly**
  Not everything in one catch-all account.
- [ ] **3 Keep records in cloud accounting**
  Current through the year beats reconstructing at year-end.
- [ ] **4 Gather source documents**
  Have them organized and on hand before you start.
- [ ] **5 Note any group structure**
  Each entity is its own compilation, with its own fee.
- [ ] **6 Flag prior years**
  Catch-up across several years adds to the fee.
- [ ] **7 Confirm the lender's requirement**
  A compilation, not a review, is enough for most SMB lending.
- [ ] **8 Bundle sensibly**
  Ask for the compilation, T2, and bookkeeping quoted together if you need all three.

**PRO TIP**

A compilation provides no assurance. Confirm your lender does not require a review or audit before you buy, so yo

## What happens next

1. **Free consultation**
   We review your books and the business.
2. **Flat fee, from $400 + tax**
   Quoted in writing before any work starts.
3. **Compiled and reported**
   Statements under CSRS 4200 for your approval.

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