



# HOW TO USE THIS RESOURCE

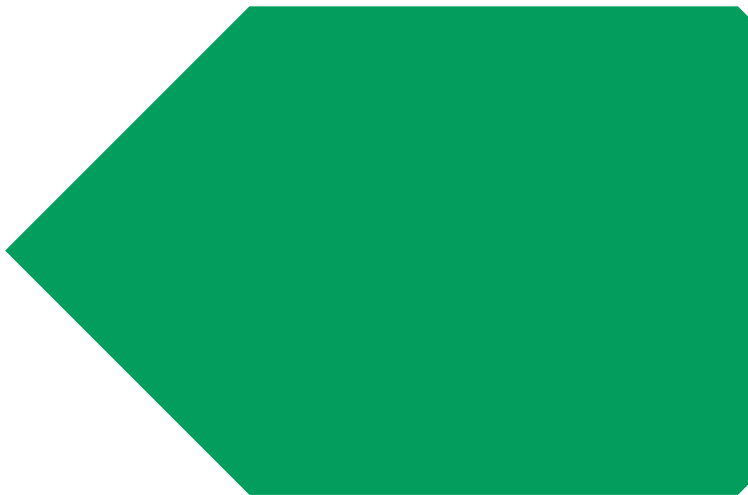
1) An example bookkeeper portfolio follows these instructions

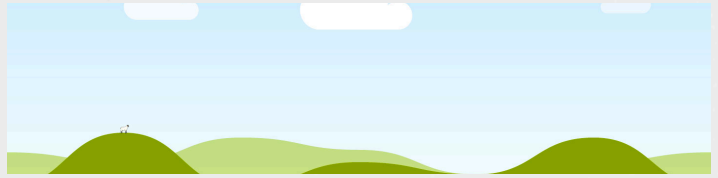
2) Make a copy of the Canva template so you can create your own:

<https://canva.link/wim28d7rex14dea>

3) Craft a bookkeeper portfolio you can use with potential clients

*Prerequisite: you will need a Canva account to access the template, but you should be able to use the free version of Canva.*





2026

**BUSINESS NAME**

**WORK WITH ME**

Helping lawyers run their business  
with more clarity, structure, and  
support



Morgan Law

[finepoints.biz](https://finepoints.biz)

[@FinePointsBookkeeping](https://www.instagram.com/FinePointsBookkeeping)



*Hey,*

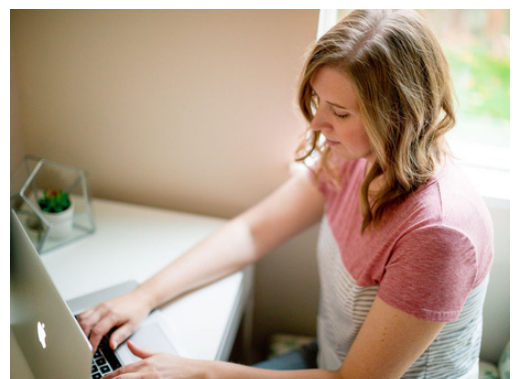
*I'm Morgan*

I'm the owner of FinePoints Bookkeeping, and I help business owners get organized. As a bookkeeper, I'm reliable, personable and consistently produce quality results.

I'm an honors grad from Pepperdine University and worked for years at Target's headquarters as a copyeditor. However, I wanted the flexibility of owning my own business, and I love helping business owners take control of their finances. When your numbers are organized, you get clarity to make more strategic business decisions.

*Connect with me!*

NAME  
WEBSITE  
SOCIAL



# My Services

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## WAYS I CAN SUPPORT YOU

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### Getting started

We'll meet to discuss the type of business and accounting system you have, I'll start or take over a QuickBooks file, and I'll organize and input existing transactions to current date.

### Initial projects

If your books need to be organized, I'll review and reconcile your company's records to ensure accuracy and consistency.

### Ongoing support

As a monthly, ongoing service, I'll download and categorize company monthly transactions into QuickBooks. I'll email a monthly financial statement to you so you can see how things look. We'll have monthly correspondence regarding financial status, and I'll serve as a liaison between you and your accountant throughout the year.

### Optional Add-ons

These services include invoicing, bill pay, and income categorization.

### Services not offered

These include legal business advice, tax preparation, manual payroll, or on-site bookkeeping

# Who This is For

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WEBSITE

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My services are for you if:

- You're doing too much on your own
- Things feel scattered behind the scenes
- You want consistent, reliable support
- You're ready for more structure without more pressure





# Client Reviews



“Morgan has made a great difference to our bookkeeping. Morgan is consistent, reliable and knowledgeable. She is quick to problem-solve, coming up with efficient and elegant solutions. Her comfort with technology is a huge asset.”

— **Amanda B. (Department Manager)**



“Working with Morgan Law has been a remarkable experience. As an artist it is easy for me to overlook bookkeeping tasks. Morgan not only organizes my finances but also gives reports, communicates with my CPA and has helped me to achieve both large and small financial goals. She communicates clearly and answers any questions I have in a very prompt manner. I highly recommend working with her!”

— **Hilary A. (Business owner & Jewelry Designer)**



“Morgan has done a terrific job. She is so efficient that she has also taken on the task of creating a monthly dashboard, got involved with medical billing tasks and more. Our finances are under total control and we learned quickly that we can count on Morgan to do a great job with whatever we throw at her.”

— **Barbara P. (Executive Director)**



# Pricing

GETTING  
STARTED  
\$30/HR

ONGOING  
SERVICES  
\$300/M

ADD ON  
SERVICES  
VARIES

Meet to discuss type of business and accounting system

Start or take over QuickBooks file

Organize & input existing transactions to current date

Download & categorize monthly transactions into QuickBooks

Email monthly financial statements to client

Monthly correspondence regarding financial status

Serve as liaison between client & accountant throughout year

Optional add-ons include invoicing, bill pay, income categorization, etc.



# WORK WITH ME

READY TO \_\_\_\_\_?

STEP ONE

## **Start the conversation**

Book a discovery call with me so we can determine if we'll be a good fit to work together.

**BOOK HERE**

STEP TWO

## **Create a plan**

We'll determine the right package for you, a timeline for getting started, and create a workflow for setting up the systems

STEP THREE

## **Ongoing Support**

I step in to support, simplify, and help things move forward consistently

STEP FOUR

## **Questions?**

Just send me a quick email at [hello@finepoints.biz](mailto:hello@finepoints.biz)

# Get Ready!

If we decide to work together, here are a few things I'll want to understand:

- What version of QuickBooks do you have (if any)?
- Bank accounts used (including credit cards and other).
- How do you organize receipts/financial documents?
- How many employees do you have (if any)? Which payroll service do you use?
- Is there anything unique about how you'd like your P&L organized (pre-set accounts, classes, tracking jobs, etc.).
- How do you prefer I communicate with you (text, email, call)? Would you prefer a monthly phone call or questions as they come?
- What is the price range you are looking for (per month) for a bookkeeper?
- What is the biggest challenge in your business right now?