



Member Profile

Who?

- **SumUp LLC – Rick Manies, President**
- **209.570.6680 / Richard.manies@gmail.com**

Where located?

- **Usually at clients office, by appointment.**

What services/products do you offer?

- **Primary – Bookkeeping & Accounting Services**
- **Other – Offshore Business Opportunity Evaluation**

When available/hours of operation?

- **By appointment**

Method of payment?

- **Check, cash, credit card via Papal**

Who can you help or what problems can you solve?

- **I can take the business records out of the “box” and get your financial records in order so you can accurately know your business status as any time.**

How can you help people reach their goals?

- **I can help businesses determine profitability.**
- **I can help with tax documents and filings.**
- **I can help streamline your handling of records to reduce time & efforts, resulting in lower costs.**

Why choose you over a competitor?

- **The scope of services I offer far exceed what is found with traditional bookkeeping.**
- **I help evaluate and correct cash flow problems as well as help create cash management plans.**
- **I help streamline your company records to reduce handling / cost.**
- **I have as associates both CPA and Tax Manager / EA services available.**

What is a good referral for you?

- **A good referral is any contractor type business; general, engineering, or trade (plumber, electrician, etc), or similar businesses such as janitorial, cleaning, handyman, etc.**

What does not constitute a good referral?

- **Retail business, medical office (any), restaurants (small OK),**

Who do you know who? What is your DREAM referral?

- **DREAM - Contractor type business, 3-10 employees, business volume of \$500K - \$3M**
- **ATTENTION – I AM LOOKING FOR 45 GOOD REFERRALS FROM LODI FOUNDERS BY DECEMBER 31, 2007**