

Charter Wise

<https://www.christywhite.com/charterwise#form>

348 Olive Street

San Diego, CA 92103

Contact: Stephanie White, swhitehouse@charterwise.com

Phone conference on 9/25/19

Rec'd proposal on 9/30/19

Notes from phone conference on 9/25/19:

- Stephanie Whitehouse reached out with Alexis, Christy, and Carrie
- They are part of a larger audit firm, that audits charter schools in CA
- Women owned and operated company
- Boss went to Chico State and would be thrilled to get our account
- They use quickbooks and paychecks
- Expect two proposals, one from Charter Wise and one from paychecks
- They are remote out of San Diego - zoom calls
- We can call them as a resource in our interim
- Requested follow up questions. I emailed them later the same day.
 - How many hourly staff and how many salary staff? We have 26 salary and 36 hourly.
 - How many payroll times a month? Two payroll times a month. Attached payroll calendar
 - Pay dates for classified and salary pay dates? Salary employees are paid on or around the 26th of each month.

9/26/19 - they emailed me information about the wildfire relief to make sure that we were aware of what is out there.