



THE POCKET SECRETARY
CHLOE FRIESEN
VIRTUAL ASSISTANT

Service Provider:

Chloe Friesen, VA.
The Pocket Secretary,
Operating as a Sole Proprietor.
Aylmer, Ontario, Canada.

Package 4:

The Lifestyle Support Suite

For the Overwhelmed Executive/Founder | The Busy Career Parent | The Frequent Traveler.

Response time: Same day (business hours.)

Includes:

- Travel and Trip Planning.
- Online Errands and Shopping.
- Household and Service Coordination.
- Personal Finance Administration.
- Correspondence and Communication.
- Research and Recommendations
- Weekly check-in / report / delegate: (Included in the retainer)

THE POCKET SECRETARY | VIRTUAL ASSISTANT PACKAGES

Package 4:

The Lifestyle Support Suite (breakdown.)

Includes:

Monthly Retainer:

(10, 20, 30 hrs a month, depending on personal needs.)

- For **x** hours a month I focus on you and only you. Stop managing your life and start living it! My Personal Assistant package is designed for high-performers who need a "second brain" to handle the logistics of daily life. Whether it's planning a seamless 3-city trip, vetting a reliable plumber, or ensuring your personal bills are paid on time, I provide the backend support that allows you to stay focused on the big picture.

Travel and Trip Planning:

- Researching flights, booking hotels, arranging transportation, and building detailed, all-in-one itineraries.

Online Errands and Shopping:

- Purchasing gifts for friends or family, ordering groceries, finding items online, or arranging deliveries.

Household and Service Coordination:

- Researching local contractors, plumbers, or cleaners, and scheduling them for home maintenance.

Personal Finance Administration:

- Paying bills, tracking personal expenses, or monitoring subscriptions and renewing them.

Correspondence and Communication:

- Managing personal email, drafting emails, replying to invitations, or handling personal correspondence.

Research and Recommendations:

- Purchase Research, Vendor Vetting & Sourcing, Lifestyle & Experience Planning, Gift Sourcing.

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Package 4:

The Lifestyle Support Suite (breakdown.)

Continued:

Weekly check-in / report / delegate: (Included in the 45 hrs)

At the beginning of the week we will schedule a 15 minute Zoom meeting/phone call to provide a comprehensive update on all activities and developments from the past week, ensuring you remain informed. During the meeting, we will also discuss key priorities for the upcoming week. If calls are not preferred, we can resort to a weekly email updates instead.

Topics that will be discussed via the meeting:

1. *The "Week Ahead" Look-Forward.*
2. *Personal Admin & "Decision Hurdles."*
3. *Household & Maintenance.*
4. *"Life-Sync" Preferences.*

PACKAGE PRICING

The Lifestyle Support Suite (Introductory Rate / 1st Month.):

Price: \$35.00 CAD / hr + TAX.

- Monthly Retainer choice determines final cost.

On - going monthly rate:

Price: \$40 CAD / hr + TAX.

- Monthly Retainer choice determines final cost.

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PACKAGE BOUNDARIES

- **Monthly hours DO NOT roll over.** (Unless requested at the beginning of the months for an additional cost. See below for add on pricing.)
- **Tasks must be submitted by email or shared doc.**
- **No phone/video calls unless scheduled.** (However please feel free to email me at any time. My response time for this package is 24–48 business hours.)
- **Bookkeeping = Organization ONLY.**
Does not include tax filing or financial advising.
- **Client MUST be willing to provide clarification when needed, as well as a full walk through of expected operations to ensure a seamless start.**

ADD ON'S

Book Keeping Catch-up: \$200–\$300 one-time (+ TAX.)

- Are you overwhelmed with a backlog of invoices and paperwork? Have you been unable to find the time to sort, scan, and organize everything? Let me assist you by managing these tasks, helping to reduce your workload and restore mental clarity. A clutter-free workspace contributes to a clearer, more focused mind.

Extra hours: \$50 - \$55 /hour (+ TAX.)

- If your current package does not provide sufficient time to complete all your tasks this month, or if you wish to extend your hours to allow for more flexibility, we are pleased to offer additional hours to better accommodate your needs.

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THE DISCOVERY PHASE

To provide the high-level, intuitive support you deserve, I begin every partnership with a deep-dive Discovery Phase. This process allows me to map out your unique preferences, from your preferred travel logistics to your household standards and communication style. By capturing these details upfront, I eliminate the need for back-and-forth questions later, allowing me to act as a seamless extension of your life. The following 'Lifestyle Audit' ensures that every recommendation I make and every task I execute is perfectly aligned with your personal standards and goals. This audit can be adjusted whenever you have new preferences.

PRIVACY & TRUST:

Your privacy is the cornerstone of our partnership. I operate with a 'Discretion-First' philosophy, ensuring that all sensitive information—from financial data to personal family schedules—is handled with the highest level of confidentiality. To guarantee your security, I utilize bank-grade encryption tools like 1Password for credential sharing and am fully prepared to sign a comprehensive Non-Disclosure Agreement (NDA) before our first session. My goal is to be a seamless, invisible extension of your life, providing you with total peace of mind that your private affairs remain exactly that: private."

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