

Year-End Accountant Meeting

Book the Meeting!

Get it on the calendar before the year runs out!

Date: Notes:

Bring Your Books!

Updated income, expenses and receipts.

What's left to do? Notes:

Tax Saving Moves!

Equipment purchases, retirement contributions.

What can we buy or change?

Notes:

Get Your Tax Estimate!

Know what you'll owe so you're not hit with a surprise.

\$\$ Notes:



Review Deductions!

Make sure every write off is accounted for.

What did we forget?

Notes:

Plan Cash Flow!

Set aside enough to cover taxes without draining your cup.

Do you have a separate account?

Notes:

Adjust for Next Year!

Update quarterly payments and payroll if needed.

Notes: