

OCTOBER

through

DECEMBER

tax prep roadmap

#1

CHECKPOINT

Make an appointment with your CPA to begin your end-of-year planning

#2

CHECKPOINT

Make sure your bookkeeping is up-to-date and ALL receipts are entered

#3

CHECKPOINT

Are your current goals realistic? If not, rethink them and adjust making sure you have the accountability solidified in reaching them!

OCTOBER

#1

CHECKPOINT

If you paid an independent contractor over \$600 in 2017, begin gathering their name, address, and EIN/SSN in preparation for 1099's

#2

CHECKPOINT

Begin budgeting for Christmas bonuses for your employees

#3

CHECKPOINT

Begin your preliminary budget for 2018!

NOVEMBER

#1

CHECKPOINT

Set appointment with bookkeeper to review financial status

#2

CHECKPOINT

How much money do you want to save by this time next year? Make a solid plan to reach that goal

#3

CHECKPOINT

Solidify budget for 2018

DECEMBER

OVERWHELMED?

First consultation with Better Bookkeepers is always free and our specialty is setting up our clients to succeed.
Give us a call: 707.474.9510

"I believe that through knowledge and discipline, financial peace is possible for all of us." Dave Ramsey

