

Business Owner Financial Health Check

Find out in 3 minutes whether your business finances are healthy, stressed, or overdue for attention.

Check every statement that is TRUE for your business:

- Do you know your monthly profit?
- Are your bookkeeping records current?
- Do your bank accounts reconcile?
- Do you review financial reports monthly?
- Do you set aside money for taxes?
- Can you pay yourself consistently?
- Do you know your cash flow position?
- Do you trust the numbers in QuickBooks?
- Do you know your biggest expense categories?
- Could you provide financial reports if a lender requested them today?

Your Results

■ 8–10 Checks — Financially Healthy

Your financial systems appear strong. Continue reviewing your numbers consistently.

■ 5–7 Checks — Needs Attention

A few gaps could become larger issues if left unresolved.

■ 3–4 Checks — Warning Zone

Your business may be operating without reliable financial visibility.

■ 0–2 Checks — Action Needed

It's time to create a plan before small problems become expensive ones.

Jennifer's Tip

Most business owners don't need more hustle. They need better visibility. When you know your numbers, you make better decisions with confidence.

What Happens Next?

If your score landed in the yellow, orange, or red zones, a Paid Diagnostic Review can identify exactly what's working, what's missing, and what needs attention.

Paid Diagnostic Review – \$297

- ✓ Review of your QuickBooks Online file
- ✓ Findings and screenshots
- ✓ Personalized action plan
- ✓ One-hour Zoom review

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