

Monthly Money Checklist

Simple habits that help you stay organized, confident, and in control of your finances.

Weekly Money Check-In

- Review recent transactions
- Check account balances
- Look for anything unusual or unexpected
- Celebrate one financial win from the week

Monthly Financial Tasks

- Download bank and credit card statements
- Categorize and review transactions
- Reconcile all bank and credit card accounts
- Review your Profit & Loss report
- Check cash flow
- Set aside money for taxes
- Review subscriptions and recurring expenses

Quarterly Review

- Review overall profit and expenses
- Adjust your budget or spending plan
- Check progress toward financial goals

■ Identify one area for improvement next quarter

Mindset Reminder

Small, consistent actions create big financial results. Staying on top of your money a little at a time is far easier than digging out of a mountain later.

Need Help Staying on Track?

You Don't Have to Do This Alone.

Whether your books need a little attention or a complete cleanup, Freedom Found Financials can help you create a clear plan and move forward with confidence.

Start with a Paid Diagnostic Review

- ✓ Review of your QuickBooks Online file
- ✓ Identification of errors and problem areas
- ✓ Personalized action plan
- ✓ Clear scope of work and pricing

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Make Your Money Work For You