START HERE

Six easy steps. . .

Basic Bookkeeping

ARE YOU READY?

Step 1

Gather your financial documents – bank and asset statements, credit card and loan documents, income forms and expense receipts.

Step 2

Categorize your transactions into income, expenses, assets, and liabilities.

Step 3

Reconcile the transactions and accounts consistently.

Step 4

Prepare financial statements -Profit and Loss shows money in and money out. Balance Sheet shows big picture of your financial health.

Step 5

Review the financial statements to make better financial decisions.

Step 6

Share your findings with those that need to know -associates, family, etc.

FINISH

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Best practice is to use GAAP guidelines and a Bookkeeper/CPA.