

WINDOM DAVIS PERSONAL BUSINESS SOLUTIONS



# Bringing Organization to Chaos

# Bringing Organization to Chaos



Dear Entrepreneur,

**Subject:** How is your Business Health?

We're excited to introduce the **Business Health Checkup Questionnaire**—a simple yet powerful tool designed to help you assess the strength of your business organization across five key areas: Bookkeeping, Budgeting & Forecasting, IRS Troubleshooting, Cybersecurity, and Business Education.

Use the [adjoining link](#) to answer a series of questions about the five key areas. After you complete the Business Health Checkup Questionnaire, you will receive a score. If your results reflect moderate organization risk or high disorganization risk, then I invite you to explore how our team can assist.

✉ Sending us an email at: [contact@profoundtunedtrumpetgroupllc.com](mailto:contact@profoundtunedtrumpetgroupllc.com). Second, please include how you learned about us. We offer discounted prices for membership and client referrals.

We look forward to helping you strengthen your business foundation and move toward greater confidence and control.

Warm regards,

*Cheryl Davis*

CEO, Windom Davis Personal Business Solutions

*Let's Get Started*

# Business Health Checkup Questionnaire



**Questionnaire**

Click above link

# Bringing Organization To Chaos

# Bringing Organization to Chaos

## Core Bookkeeping Practices for All Solopreneurs

### -Separate Business Bank Account.

**Never mix personal and business funds**, this protects liability and simplifies tracking.

### - Track All Income & Deposits

-record gross income, refunds, grants, and other inflows. Use categories that match your tax reporting.

### - Document All Expenses

Keep receipts, invoices, and proof of payment. Categorize by type (e.g., office supplies, travel, software). You can do this in folders, large envelopes, take a photo or scan and digitally file.

### - Maintain a Mileage Log

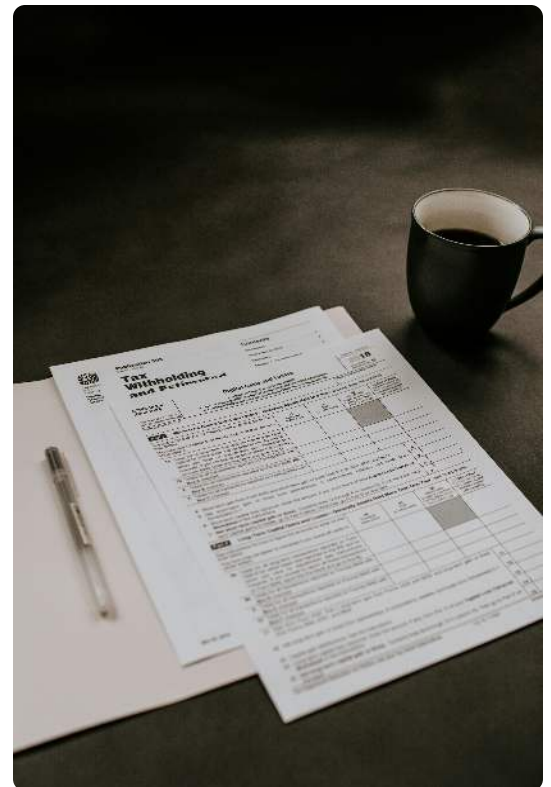
If driving for business, record date, purpose, and miles. Use a mobile App or spreadsheet.

### - Reconcile Monthly

Match bank statements to your bookkeeping records to catch errors and stay audit-ready

### -Retain Supporting Documents

Keep digital or paper copies of contracts, receipts, tax filings, and correspondence for at least 3–7 years.





# Bringing Organization to Chaos

## ✚ Additional Best Practices by Entity

### 👤 Sole Proprietor / SMLLC

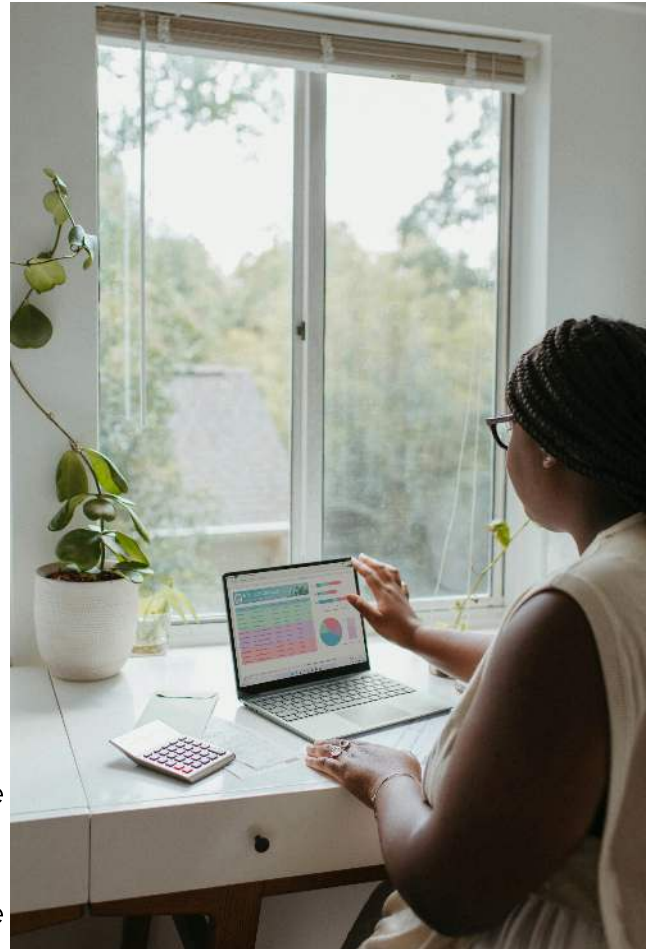
- Use a simple spreadsheet or bookkeeping software (e.g., Wave, QuickBooks Simple Start)
- Track estimated tax payments quarterly
- Keep a log of business use of home (if claiming home office deduction)

### 🏢 C Corporation

- Maintain a general ledger with journal entries
- Record board minutes and shareholder meetings
- Track funds that you receive and expenses that the business pays that are personal

### 👥 S Corporation

- Run payroll for owner-employees (reasonable compensation is required)
- Track distributions separately from salary
- File W-2s and 941s for payroll compliance (anytime you have employees)



# UNIVERSAL ESSENTIALS

## BOOKKEEPING FOR ALL SOLOPRENEURS

---

### UNIVERSAL ESSENTIALS

- ☐ Keep separate bank accounts for business and personal
  - ☐ Track and categorize all income and expenses
  - ☐ Record your mileage every time you fill up or charge up, keep the receipt
  - ☐ Get the overall square footage of your home and determine your percentage business use of home
  - ☐ Reconcile books monthly with bank statements
  - ☐ Have a system to retain receipts and supporting documents
  - ☐ Have a spreadsheet of filing requirements and dates for state, federal and local government
  - ☐ Get access to an attorney, accountant/bookkeeper, and tax preparer
- 

*let's get started*

[illegible]

## Let's Get Started



# Bringing Organization to Chaos

## Cheryl Davis, EA, MAOM

A retired Supervisory Internal Revenue Agent with the IRS, Cheryl has over thirty years of auditing experience ranging from small businesses to publicly held corporations. She has worked in the specialty areas of Excise Tax, Employment Tax, and Taxpayer Education & Communication, as well.

Her speciality is bookkeeping. Her clients include mature companies, high income individuals, as well as new business owners.

She and her cadre of advisor specialists provide decades of expertise in the following areas:

- Bookkeeping/Accounting
- Personal + Business Budgeting & Forecasting
- IRS Troubleshooting and Consulting
- Cybersecurity
- Business Education

Over 90% of WDPBS clients are obtained from referrals of satisfied clients and the relationships forged within membership groups.

*Let's Get Started*