



The Klarity Checklist™

Managing your accounting so you don't have to.

Recordkeeping & Organization

- ◇ All bank and credit card accounts are fully reconciled each month.
- ◇ I keep digital copies of receipts and invoices attached to transactions.
- ◇ My chart of accounts makes sense – no duplicate or confusing categories.

Payroll & Compliance

- ◇ Payroll is processed on time with all federal / state filings current.
- ◇ I have proper W-9s and contractor agreements for all 1099 vendors.
- ◇ I review payroll liabilities monthly and verify tax deposits.

Cash Flow & Financial Health

- ◇ I know my current cash-on-hand and upcoming obligations.
- ◇ I have at least one month of operating reserves.
- ◇ I track incoming/outgoing trends (cash flow statement or KPI dashboard).

Tax Readiness

- ◇ My prior-year taxes were filed on time and I know my current-year estimated payments.
- ◇ My entity structure (LLC/S-Corp) matches my income and goals.
- ◇ I'm tracking deductible expenses accurately and consistently.

Advisory & Growth Insight

- ◇ I receive or review management reports monthly (not just at tax time).
- ◇ I know my key profit margins and debt-to-equity ratio.
- ◇ I meet with an accountant or advisor at least quarterly for review.

Klarity Score



12 - 15: You're operating in Klarity – keep it up!



8 - 11: You're halfway there – time for a professional review.



0 – 7: Chaos detected! Let's bring your books back to Klarity!

KVP Accounting, LLC
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Book your free Klarity Consultation!

