

The Business Financial

Clarity Review

REFOCUS

1. Review your business goals.
 - a. What did you accomplish?
 - b. What didn't go as planned?
 - c. What matters most going into next year?
2. Celebrate Wins.
 - a. Identify three wins
 - b. Write them down
3. Identify Challenges. Where were you:
 - a. Stretched?
 - b. Frustrated?
 - c. Overwhelmed?
4. Reconnect with your "why."
 - a. Why does this business exist?
 - b. Are you still mission aligned?

GAIN CONTROL

1. Review Reports.
 - a. Profit and Loss
 - b. Balance Sheet
 - c. Cash in the Bank
2. Review your owner's pay. Was it:
 - a. Consistent?
 - b. Sufficient?
 - c. Sustainable?
3. Organize your books.
 - a. Reconcile accounts
 - b. Categorize transactions
 - c. Fix discrepancies
4. Review debt.
 - a. List balances
 - b. Focus on one to pay off
5. Review subscriptions and expenses
 - a. What do you use?
 - b. What don't you use?
 - c. What can be canceled or downgraded?
6. Review insurance
 - a. Does your coverage fit?
 - b. Check beneficiaries

SET A PLAN

1. Set three goals for the new year.

Consider:

- a. Revenue
- b. Profit
- c. Systems
- d. Owner's Pay

2. Make a simple budget

- a. Monthly expenses
- b. Estimated taxes
- c. Owner's pay
- d. Savings goals

3. Plan your CEO time. Choose:

- a. Weekly 30-minute admin time
- b. Monthly CEO Day
- c. Quarterly Review

4. Choose your improvement.

- a. Find a small change
- b. How can you improve?



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Discover a Life of Financial Freedom

QUICK START PRIORITIES

1. Quick Wins:

- a. Reconcile Bank Accounts
- b. Cancel one unused subscription
- c. Update Beneficiaries

2. One Time Setup

- a. Set your owner's pay amount
- b. Build a simple monthly budget

3. Accountability

- a. Put CEO time in your calendar
- b. Share your goals with an accountability partner or coach

Financial Accountability Coach – Small Business Consultant

[www. CoachKimE.com](http://www.CoachKimE.com)

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