

Barrus Bookkeeping & Services

Monthly Digest

March



How to Help Your Bookkeeper Prep for Canada Tax Season

To assist your bookkeeper in preparing for tax season, consider the following steps:

- **Reconcile all accounts:** Ensure all bank and credit card statements are accurate and accounted for. Resolve any discrepancies promptly.

- **Organize all receipts:** Gather all receipts for business expenses, both physical and digital. Digitize them and store them in a cloud-based folder for easy access, if not done.
- **Review invoices:** Check for unpaid invoices and send reminders to clients to improve cash flow and ensure no money is left on the table.
- **Run financial reports:** Generate Profit & Loss, Balance Sheet, and Cash Flow statements to get a comprehensive overview of your business's financial health.
- **Verify payroll records:** Verify payroll records for employees and contractors. Prepare T4, T4A, or any other slips that apply by the deadline.
- **Prepare for next year:** Use insights from this year's data to set financial goals, create a budget, and plan for growth in 2025.

By following these steps, you can help your bookkeeper stay organized and ensure a smooth tax season for your business.

Thanks everyone for reading, stay safe and let's watch out for each other.

On To The...

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