

# Business Financial Health Assessment

## Interactive Scorecard

Discover if your bookkeeping is helping your business grow - or holding it back. Answer each question and the total score will calculate automatically in Adobe Acrobat or Reader.



**Each YES answer = 2 points**

Total possible score: 46 points

Select Yes or No for each item. Your score will calculate on the score page.

### Bookkeeping & Organization (12 Points)

- Yes (2)      No (0)      My bank accounts are reconciled every month
- Yes (2)      No (0)      My credit cards are reconciled every month
- Yes (2)      No (0)      My financial records are up to date
- Yes (2)      No (0)      I can locate receipts and documentation quickly
- Yes (2)      No (0)      Personal and business expenses are separate
- Yes (2)      No (0)      I always know my current cash position

### Financial Reporting (10 Points)

- Yes (2)      No (0)      I review Profit & Loss reports monthly
- Yes (2)      No (0)      I review my Balance Sheet monthly
- Yes (2)      No (0)      I understand my business profitability
- Yes (2)      No (0)      I know which products/services make me the most money
- Yes (2)      No (0)      I use financial reports to make business decisions



### Payroll & Compliance (14 Points)

- Yes (2)      No (0)      Payroll is processed accurately every pay period
- Yes (2)      No (0)      Payroll taxes are filed on time
- Yes (2)      No (0)      Employee records are current
- Yes (2)      No (0)      Contractor payments are tracked correctly
- Yes (2)      No (0)      I feel confident my payroll is compliant
- Yes (2)      No (0)      My books are tax-ready year-round
- Yes (2)      No (0)      Tax season is not stressful for me

### Business Growth & Planning (10 Points)

- Yes (2)      No (0)      I have an annual budget
- Yes (2)      No (0)      I compare actual results to budget monthly
- Yes (2)      No (0)      I track key business goals
- Yes (2)      No (0)      I understand my cash flow trends
- Yes (2)      No (0)      I know where my business is headed financially



## Your Score

Total Score

Out of 46 possible points

Financial Health Grade

## What's Your Score?

### 40-46 Points - A+ Financially Strong

Your financial systems appear organized, accurate, and proactive.

### 30-39 Points - B Good Foundation

You have a solid foundation with opportunities to improve efficiency and visibility.

### 20-29 Points - C Growth Opportunity

Several areas could benefit from stronger bookkeeping processes and reporting.

### 10-19 Points - D At Risk

Your business may be operating without complete financial visibility.

### 0-9 Points - F Immediate Attention Needed

Your bookkeeping may be preventing informed business decisions and creating unnecessary stress.





## Ready for Financial Clarity?

If your score shows gaps in your bookkeeping, payroll, reporting, or tax readiness, Premium Bookkeeping Solutions can help you create a clear path forward.

**Yes! I would like a complimentary review of my score and a customized recommendation.**

**Business Name:**

**Contact Name:**

**Phone:**

**Email:**

### Premium Bookkeeping Solutions

Monthly Bookkeeping | Payroll Services | Financial Reporting | Cleanup & Catch-Up Services | QuickBooks Online Training