HONEST BOOKKEEPING SELF-CHECK

Check the boxes that are true for you.

SECTION 1: Do You Actually Know What Your *Numbers* Say?

- ☐ I could tell you my exact profit margin right now, without opening QuickBooks
- ☐ I understand the difference between my bank balance and my actual profit
- ☐ I know what "Accounts Receivable" and "Accounts Payable" mean — and my current numbers for both
- ☐ I could explain my balance sheet to someone else in under 2 minutes
- ☐ I categorize every transaction the same way, every time

If you left 2 or more unchecked: You're running your business on guesswork, not data.

SECTION 2: Are Your Books Actually *Tax-Ready*?

- ☐ My books are reconciled every single month — not just at tax time
- ☐ I know exactly what I owe (or am owed) in receivables and payables right now
- ☐ My bookkeeping is caught up to the current month
- ☐ I've never had my accountant send back my books with corrections needed
- ☐ I could hand my books to a CPA today with zero scrambling

If you left 2 or more unchecked: You're one audit or one January away from a very expensive scramble.

SECTION 3: What Is "Doing It Yourself" Actually *Costing You*?

- ☐ I spend less than 2 hours a month on bookkeeping tasks
- ☐ I've never avoided opening QuickBooks because I didn't want to deal with it
- ☐ I make pricing and hiring decisions using real numbers, not gut feeling
- ☐ I've never missed or been late on a bill because I lost track
- ☐ My bookkeeping time isn't taking time away from serving clients or growing the business

If you left 2 or more unchecked: The "savings" of DIY bookkeeping may be costing you more than a bookkeeper ever would.

Bottom line: When you don't know what your numbers say, you don't know what you don't know.