

Business Check-up

If you make money in your business, this check-up will help you confirm whether your finances are set up properly — or where gaps may exist.

INCOME & TRACKING

I know where all my business income comes from

Yes No

I can explain what each deposit was for

Yes No

I know exactly how much I made last month

Yes No



If you're making money as a business owner, you should be tracking where your income comes from and how it's being used.

BUSINESS & PERSONAL SEPARATION

I have a separate business bank account

Yes No

I don't regularly mix personal and business spending

Yes No

My business structure matches how I operate

Yes No



Business formation and cleanup matter more than people realize.

BOOKKEEPING BASICS

My income and expenses are recorded consistently

Yes No

My bank accounts are reconciled

Yes No

I have access to a Profit & Loss report

Yes No

I understand what my reports are telling me

Yes No



Clean books = better decisions + easier taxes.



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PAYROLL & PAYMENTS

I understand how I should be paying myself

Yes No

Payroll is set up correctly (if applicable)

Yes No

Payroll taxes are being handled properly

Yes No



Payroll mistakes can create penalties fast.



TAX READINESS

I'm not scrambling at tax time

Yes No

I understand what taxes I owe and why

Yes No

My books are tax-ready

Yes No

I'm not surprised by my tax bill

Yes No



Taxes work best when they're planned – not rushed.



FINAL CHECK

If you checked YES to most of this list — you're ahead of many business owners.

If several boxes are checked NO — that's not failure.

That's simply a sign you need better structure and support.

HOW BUSINESS MONEY GURU HELPS

We support individuals and business owners keep more of their money.

 If you're ready for clarity and support, connect with Business Money Guru to get started.

- Tax preparation (individual & business)
- Bookkeeping (monthly or catch-up)
- Business formation & restructuring
- Payroll setup and processing