

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.



Business Check-up

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