



10 STEPS

To Mastering Financial Clarity In Your Business

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- ☐ **Step 1: Start Today!**
Begin tracking your expenses and income immediately. No need to wait for the perfect moment.
- ☐ **Step 2: Simple Record Keeping**
Use a spreadsheet or expense tracking app. Snap pictures of receipts for easy reference.
- ☐ **Step 3: Categories and Labels**
Categorize expenses (e.g., office supplies, utilities, gas). Label each expense clearly.
- ☐ **Step 4: Set a Budget**
Determine a monthly spending limit. Track your expenses against your budget.
- ☐ **Step 5: Schedule Regular Updates**
Dedicate a time weekly or monthly to update your records. Stay consistent for accurate tracking.
- ☐ **Step 6: Tax-Ready Records**
Keep all receipts and invoices organized. Summarize your expenses for tax season.
- ☐ **Step 7: Analyze and Adjust**
Review your expense data periodically. Make adjustments to save money and grow your business.
- ☐ **Step 8: Growth and Opportunity**
Use expense data to identify growth opportunities. Make informed decisions for your business.
- ☐ **Step 9: Emergency Fund Building**
Set aside a portion of your profits for an emergency fund. Aim to build a safety net to cover unexpected expenses.
- ☐ **Step 10: Seek Professional Guidance**
Consider consulting with a bookkeeper, tax expert, or financial advisor. Get expert advice to optimize your expense tracking for maximum financial benefits.



Thank You!

I hope you found this checklist helpful! Interested in sharing your experience and results? I'd love to hear from you! My contact information is below.

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