Financial Fitness Assessment

Question: Do You…	Yes	No	Some-times
Use a Profit and Loss Statement and review it monthly?			
Know how much money you want to bring home?			
Use a written budget for your business?			
Have separate biz & personal checking accounts & credit cards?			
Pay estimated taxes each quarter?			
Have a tax adviser/CPA?			
Contribute to a savings account regularly?			
Track your business miles driven?			
Keep receipts for your business?			
Know how to review your financials?			
Pay yourself a regular amount each month (like a salary)?			
Use a chart of accounts?			
Know the average cost of your transactions?			
Know costs to run your business even if you make no money?			
Have a solid plan in place for your financial future?			
Have no outstanding consumer debt?			

Your Financial Team

Professional	Name	Action to Take
Accountant		
CPA/Tax Advisor		
Insurance Agent		
Attorney		
Financial Planner		
Coach		