

## Business Financial Health Checklist

A simple 10-point guide to keep your finances healthy and your business stress-free.

### Sections:


1. Do you separate business and personal finances?
2. Is your bookkeeping updated weekly?
3. Do you reconcile your bank accounts monthly?
4. Do you review cash flow at least once a month?
5. Do you know your profit margins by service/product?
6. Do you have a current budget or forecast?
7. Are you saving for taxes throughout the year?
8. Do you have clean financial reports for lenders/investors?
9. Are you tracking accounts receivable and payables?
10. Are you working with a bookkeeper or financial advisor?

### Need help cleaning up your books or setting up systems?

Reach out to **CTL Synergy Solutions** at:

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