



SUMWISE

Bookkeeping Best Practices for Small Businesses

Use this checklist to evaluate whether you're doing what is required to keep on top of your business books every month:

- ☐ I track income and expenses monthly
- ☐ I reconcile my bank and credit card accounts
- ☐ My books are up to date and ready for taxes
- ☐ I separate business from personal spending
- ☐ I review financial reports regularly
- ☐ I want more time to focus on my business

**Need help organizing your books?
Schedule your Free Consultation**