



YOUR ULTIMATE 2023

# Year-End Business Checklist



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Star Taxes and Books

# Welcome!

I'm Tamra Halley, the founder of Star Taxes and Books, and I'm thrilled to be able to help you finish off 2023 strong!



Please keep in mind that this list is **NOT** all-inclusive of the tasks you'll need to do for your business before year-end and not all of these tasks may apply. But, this checklist **is** intended to help get you pointed in the right direction!

Please consult with your financial professionals to determine your specific year-end accounting and tax requirements.



# Business Year-End Checklist

## ACCOUNTING

- Follow Up On Unpaid Invoices
- Pay Any Overdue Bills
- Reconcile All Necessary Accounts
- Perform a Physical Inventory Count
- Clean Up Any Unused or Duplicate Accounts
- Record AJEs When Received
- Close Books for Year-End
- Prepare Year-End Financial Statements
- Compare Actual to Budgeted Numbers
- Create 2024 Budget
- Analyze Your Cash Flow Statement
- Collect Missing W-9s From Contractors
- Perform 2024 Forecasting and Projections
- Set Aside Cash for Estimated Taxes



# Business Year-End Checklist

## BUSINESS ORGANIZATION

- Update Standard Operating Procedures
- Set 2024 Business Goals
- Update Any Mailing Address Changes
- Clean Up Your Email Inbox
- Standardize File Naming Conventions
- Cancel Unneeded Subscriptions

## INFORMATION TECHNOLOGY

- Back-Up Important Data/Files
- Change Any Old Passwords
- Audit Technology Inventory
- Assess Any Upcoming Technology Needs
- Update Software & Virus Protection



# Business Year-End Checklist

## MARKETING

- Brainstorm Upcoming Marketing Initiatives
- Evaluate And Update Current Branding
- Schedule Any Photo/Video Shoots
- Update Any Dead Links On Your Website
- Ask Past Clients For Reviews
- Send Client Appreciation Gifts

## HUMAN RESOURCES

- Update Employee Handbook
- Analyze Upcoming Staffing Needs
- Stay Up To Date On State Employment Laws
- Plan Any Necessary Staff Training
- Review Any Changes to Employee Benefits
- Issue Any Year-End Bonuses





## LET'S WORK TOGETHER!

I help small business owners with their books so that they have more time to spend doing what they love!

Ready to save time and money in 2024?  
Give me a call or send a message so we can get started.



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