



Penny Wise

JULY 2024

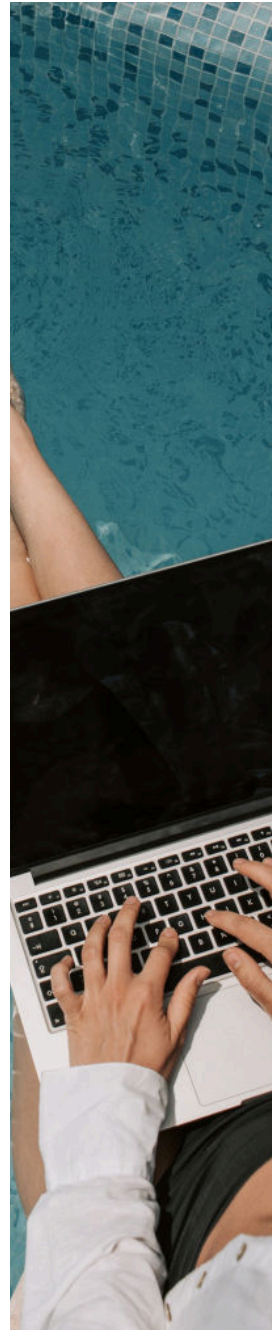
Red, White, and No Summer Blues Here

Can you believe we're already entering Q3 of 2024?!
That means it's time to ask yourself these questions:

Mid-Year Check-In Questions

- Have we met our revenue and profit goals for the first half of the year?
- Are there any changes we need to make over the next six months to achieve our goals?
- Is our bookkeeping completed through May? If not, do we have a system in place to get caught up?
- Do we have enough cash flow to meet all of our obligations?
- Have I scheduled a mid-year tax planning meeting with my tax professional?
- Are we confident that we're meeting all of our compliance and filing requirements?
- Have we saved enough for our tax payments?

If you answered **NO** to any of those questions, reply to this email and I'll help you get back on track!

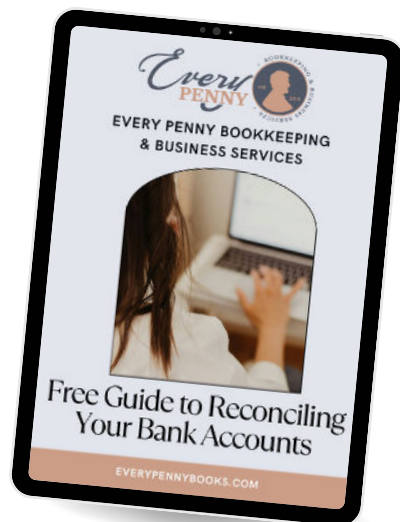


Bank Reconciliation 101

This month's freebie offers support for all of the DIY bookkeepers out there. While you won't have to worry about any of this when you work with a professional bookkeeper, it's imperative that your books are reconciled on a regular basis no matter who's doing it!

From the steps to a basic bank reconciliation, troubleshooting for common reconciliation issues, and my do's & don'ts, this free guide has all of your reconciling questions covered!

Got your bookkeeping covered? Forward this email to a friend who could use some help!

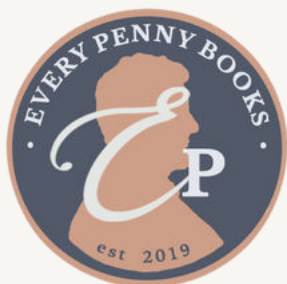


Summer Referrals & Reviews

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We would also love for you to share a review about how we have helped you and your business. The more we share the more we can help others. Feel free to leave us a google review, LinkedIn, FB or email us one.

Get in Touch



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