



End of the Year Business Checklist*

(Consult with a tax and/or legal specialist)

Taxes – Get your books in order!

- Verify your accounting records are up to date
- Document your meals, travel, and entertainment – amount, purpose, location, date, & description
- Depending on your accounting method, you may want to depreciate any assets and equipment that qualify
- Pay year end bills early
- Contribute to a retirement plan – verify the guidelines of each program – 401K, Roth IRA, SEP, etc
- Maximize deductions – make purchases of anything needed in the first quarter if able to do so – office supplies, promotional items, equipment
- Open your heart – Give to your favorite charities

Website / Internet

- Protect your domain: Make sure your website domain name is not due to expire
- Is your company information current? About Us, Contact Info...
- Update your copyrights, trademarks, and privacy statements
- Purge your mailing lists (incoming and outgoing)
- Are your Social Media outlets linked together for efficiency?
- Test all the links on your site
- Test all the forms on your site

Keep moving! Progressive Maneuvers

- Branding – Reflect
 1. Was your company portrayed in the direction you desired?
 2. How do your customers and industry colleagues perceive you?
 3. What changes should you make?
- Review your Business Plan. Does it need to be restructured?
- Review all your notes from meetings and conferences you attended. Are you implementing?
- What are your Top 3 Goals for the New Year?
- Meet with your consultant and advisor

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