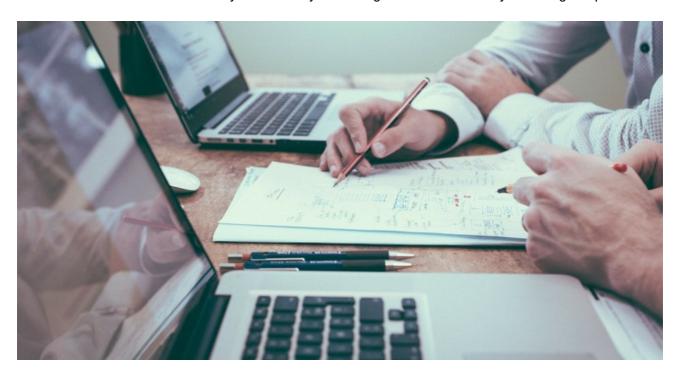
End of Year Checklist for Small Business Owners

This is crunch time for many small businesses, and business owners are trying to do it all. It's easy to overlook critical tasks necessary to end the year strong and start the new year in a good position.



Here are 27 Year End Tasks to Minimize Your Stress in the New Year

Review past year's goals and results

Business

Set new year's goals
Prepare a strategy plan to meet your goals
Hold an annual meeting if you're a Corporation or LLC
File an annual report if you're a Corporation or LLC
Take an inventory
Review and update your sales plan
Review and update your marketing plan
Conduct a social media and digital marketing audit to be sure all profiles are accurate and all links are working
Back up your computer, all your files, your phone and
Create needed hardcopies or download PDFs from cloud files
Review and update vendor files and contracts

Employees

Finish annual performance reviews
Distribute annual or performance bonuses
Evaluate staff needs for the coming year
Finances
Run all year-end software reports
Finalize all payroll federal, state and local records
Pay all vendors and contractors in full
Review your P&L statements to see where you're profitable - and where you're not
Withhold taxes from all employee bonuses
Meet with your accountant or tax preparer to schedule tax dates and estimate taxes due
Review all insurance policies
Set your new year's budget
Clients / Customers
Review your client lists
Thank all current clients for their business
Deliver client appreciation gifts
Close all outstanding year-end deliverables
Create client / customer acquistion goals
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