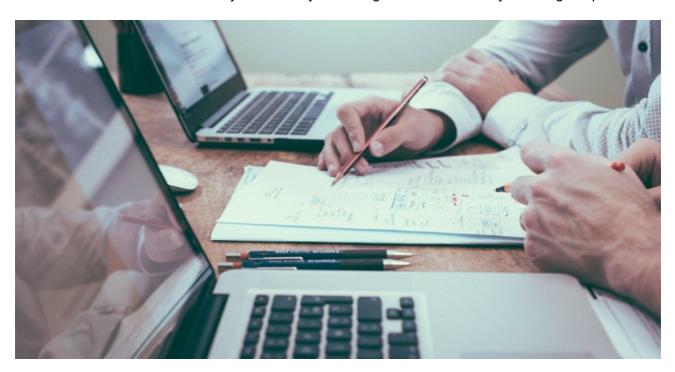
## **End of Year Checklist for Small Business Owners**

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
Paview and undate 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	J're not
Withhold taxes from all employee bonuses	
Meet with your accountant or tax preparer to schedule tax dates and estim	ate 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	Make and Share Free Checklists checkli.com