

Small Business/Entrepreneurs: End of the Year Checklist

Is your business ready for another successful year? Here's 20 things to do for your business before the end of the year.



- ☐ Make sure your bookkeeping is up to date
- ☐ Make sure your business is in good standing with the state
- ☐ Final invoices are sent out, follow up on any outstanding invoices
- ☐ Create a profit and loss statement so you can financially plan for the upcoming year
- ☐ Is there anything big purchases your company needs that you can write off?
- ☐ Outstanding bills are paid
- ☐ Organize your business recipes
- ☐ Expiring business credit card? Make sure recurring/ auto payments are up to date
- ☐ Cancel subscriptions/software you are not longer using
- ☐ Meet with accountant, make sure taxes payments are on track
- ☐ Organized and back up company files
- ☐ Archive old files
- ☐ Create company goals for the next year
- ☐ Revisit or create a new marketing and social media plan
- ☐ Reflect on what worked or didn't work this year
- ☐ Write down all your wins for the year
- ☐ Support another business that helped your business, it can be as simple as writing a review

- ☐ Update your social media
- ☐ Give a company website a little update or rebranding
- ☐ Send out a company newsletter thanking employees, partnerships, or discussing company plans for the new year

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