

Financial Clarity Checklist

A quick self-audit for beauty, wellness, and boutique business owners

Use this checklist to see what is clean, what is missing, and what needs attention before you make pricing, tax, hiring, or growth decisions.

Business Snapshot

Business basics	Current systems	Key numbers
Business name _____ —	Accounting software _____ —	Average monthly revenue _____ —
Owner name _____ —	Booking software _____ —	Cash on hand _____ —
Business type _____ —	Last month reconciled _____ —	Monthly income goal _____ —

Monthly Financial Readiness

Books and records	Profit and pricing	Cash flow
☐ Bank accounts are reconciled.	☐ Top services by profit are known.	☐ Tax money is set aside.
☐ Sales are recorded by service or product.	☐ Pricing has been reviewed this quarter.	☐ Owner pay is planned.
☐ Receipts and expenses are organized.	☐ Retail or inventory costs are reviewed.	☐ Upcoming bills are listed.
☐ Business and personal spending are separated.	☐ Discounts and promotions are tracked.	☐ Emergency reserve goal is clear.

What Needs Attention First?

Area	What I noticed	Next step
Bookkeeping		
Pricing		
Taxes		
Cash flow		
Owner pay		

Notes for My Clarity Call

Questions I want answered