

FINANCE

CHECKLIST



BETTER THAN YESTERDAY, LLC
TAX + FINANCIAL SERVICES

7 STEPS

- DECLUTTER YOUR RECORDS
- CREATE A BUDGET
- BOOKKEEPING: SUMMARIZE TRANSACTIONS
- DITCH CREDIT CARDS & DEBT
- ORGANIZE ACCOUNTS & EMERGENCY FUND
- MARRIED COUPLES COMBINE ACCOUNTS
- MAKE LISTS (FINANCIAL GOALS, ANNUAL EXPENSES, MEALS, ETC.)