

The First Step: Freeing Your Time with A Bookkeeper

To save money, you have to know where it's all going.

Bookkeepers can offer solutions by looking at your history, pain points, where you're over budget, and make recommendations on where to cut back and how to save.

Ready to hire a bookkeeper and start freeing up more time in your day? It's easier than it might sound to get started. You can do this. And we can help.

Use the worksheet below to prepare yourself for a successful start with your dedicated bookkeeper.

HAVE YOU EVER USED A BOOKKEEPER? WHAT WAS YOUR EXPERIENCE?

Write down your experience to date with a bookkeeper. Who handles this responsibility currently? What is going well? What are some common pain points?

WHAT ARE SOME OF THE MOST VALUABLE THINGS A BOOKKEEPER CAN HELP YOU WITH CURRENTLY?

List the tasks you would like your bookkeeper to focus on here.

DO YOU CURRENTLY HAVE A BUDGET? HOW OFTEN DO YOU REVIEW AND/OR CHANGE IT?

No right or wrong answers here. Write down your current process and your bookkeeper can meet you where you are now.

ANY ADDITIONAL QUESTIONS YOU HAVE DURING THE SELECTION PROCESS?

Jot down additional questions you may have, specifics about your business that will be helpful, or anything else that comes to mind. It's great to have your questions ready to go.



Accomplish More. Juggle Less.

MODERN STAFFING FROM **BELAY**

VIRTUAL ASSISTANTS • BOOKKEEPERS
WEBSITE SPECIALISTS • SOCIAL MEDIA MANAGERS

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