



1 Review your budget

Take a look at whether you've stuck to your budget for the current year (so far). Reviewing your budget before the end of year will give you some time to remedy any problems.



2 Get your books in order

Make sure your financial records are accurate and up to date, organize your expenses, and verify that you have current information for your vendors.



3 Assess profit and loss

Having a clear picture of where your money has come from and where it's been going throughout the year will help you make smart financial decisions for the future.



4 Verify accurate tax info

Make sure you've reported employee benefits correctly for W-2s and you have correct W-9s for your freelancers. It's cheaper to correct any mistakes before the end of the year.



5 Set financial goals

Get ready for a successful new year! Meet with a financial professional to help you set reasonable financial goals for next year.