

# Business financials check-in



Regular financial check-ins with your CPA (or on your own if you're into numbers) are a good idea. They can help you achieve your goals faster by putting a clear path in view. Use the boxes below to jot down some notes/ideas that will help you visualize, and prioritize, business milestones.

6 MONTHS	12 MONTHS	18 MONTHS	
<p>Does my company have positive cash flow? If not, what are my plans to make sure my practice is in the green?</p> <p>Is my scheduling streamlined enough for me to add a couple more patients to increase cash flow?</p> <p>Do I have the desired number of clients?</p> <p>What went wrong that I can change?</p> <p>Questions for accountant:</p>	<p>Do I need to plan for new equipment/replacements for my practice?</p> <p>Do I need to add more administrative or supporting medical staff to my practice?</p> <p>Am I spending enough on marketing?</p> <p>What went wrong that I can change?</p> <p>Questions for accountant:</p>	<p>Could my business benefit from adding new services?</p> <p>Do I need to look into bigger office space? Can I think about a second location?</p> <p>Questions for accountant:</p>	
		<th data-bbox="1034 1297 1406 1350">BEYOND</th> <p>What is my retirement goal? Am I saving enough to achieve that goal?</p>	BEYOND

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