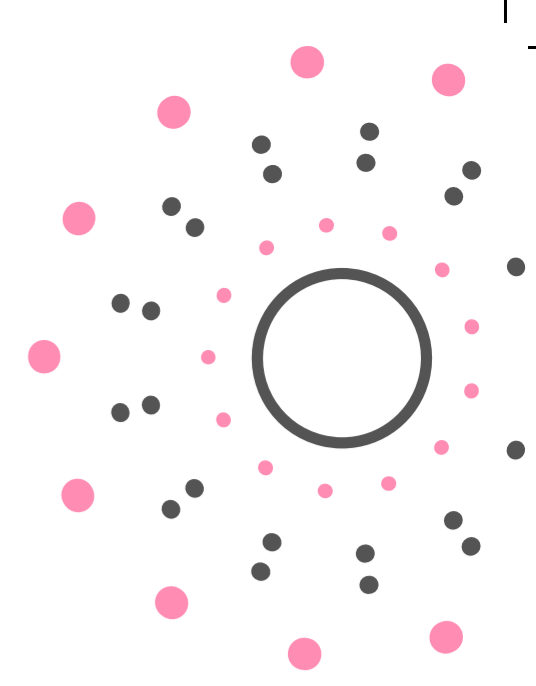


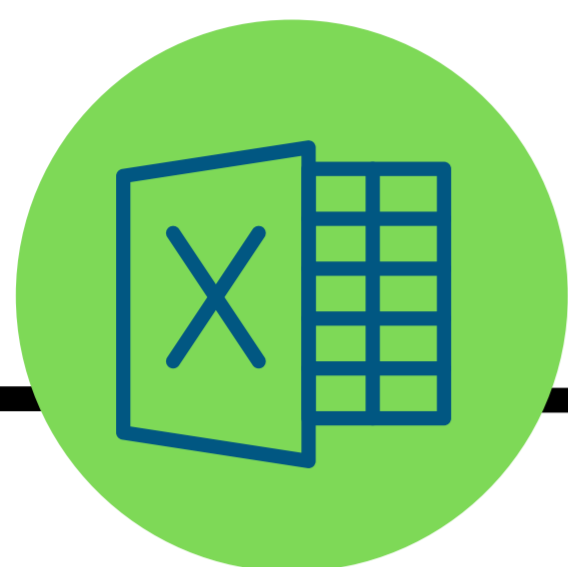


Master Your Books

with Mariette Martinez EA



CATCH UP ON YOUR ACCOUNTING COMPARISON CHART



Spreadsheet Manual Method

QuickBooks Self-Employed

QuickBooks Online Suite

Step 1

Download/export bank & credit card activity into a spreadsheet format to begin categorization of data

Step 1

Connect bank & credit card activity directly into web app that can be used to collaborate w/ accountant

Step 1

Connect bank & credit card activity directly into web app that can be used to collaborate w/ accountant

Step 2

Sort/separate money in & money out transactions into deposits & spending that relate to business activity only

Step 2

Post transactions based on Form1040, Sch.C categories & separate business/personal spending

Step 2

Categorize transactions based on 5 account types & utilize reports to prepare financials automatically

Step 3

Categorize transactions based on the 5 main account types

Step 3

Utilize electronic, automated reports to monitor finances & prepare for tax time

Step 3

Reconcile accounts, project income, manage cash flow, save taxes & stay compliant

Step 4

Sort categorized transactions based on where each account type will be reported

Step 4

Utilize Mileage & Taxes features to save taxes & stay compliant year-round

Step 4

Utilize additional tools to build wealth, calculate net worth & monitor performance

Step 5

Manually create financial reports (Balance Sheet & Profit/Loss) based on the categorized spreadsheet data

Step 5

Utilize additional tools to build wealth, calculate net worth & monitor performance

TIME TO GROW



Step 6

Prepare Form1040, Sch.C from Profit or Loss report; Utilize additional tools to build wealth & calculate net worth

FREE TIME



FREE TIME

