# LoftyBiz One-Page Accountant-Rhythm Sheet

*Companion download for LoftyBiz 184 — Working With an Accountant: What You Prepare, What They File, How You Meet*

Ask your accountant, or the person you plan to work with, for a one-page list of what to send and when. Set a monthly date to assemble that pack, start a year-end folder now, and write three questions before your next meeting. Do not wait for a filing reminder to begin. Check local dates with a local professional.

## Your week: agree the list, keep the pack

| Step | What to do |
|---|---|
| 1 | Ask for a one-page list of what to send and when. |
| 2 | Set a monthly date to assemble that pack. |
| 3 | Start a year-end folder now, and build it as you go, not in a late rush. |
| 4 | Write three questions before your next meeting. |
| 5 | Leave with written answers, and check local dates with a local professional. |

## Monthly pack and meeting notes

| Item | Write this |
|---|---|
| Send-list | The reports to export, the receipts that still needed a photo, and the date each month when the pack should arrive. |
| In this example, the pack | A sales and costs summary, a bank match, a list of new equipment or unusual payments, and copies of any tax notices. Same folder names every month. Mark a missing receipt "to follow." |
| Three questions | Write them before the meeting, and leave with written answers. Keep the reply with the pack. |
| Year-end drawer | Start from the first month: contracts, a list of staff or helpers if that applied, and a running note of anything unusual — a grant, a loan, a large repair. |
| Timing example | In this example, the pack went five working days early. Example timing, not a universal deadline. Include a one-page story of the year. |

## Helen in Des Moines (example only)

Helen runs a florist in Des Moines. After one late spring, she asked for a one-page list: the reports to export, the receipts that still needed a photo, and the date each month when the pack should arrive. In this example the monthly pack was small: a sales and costs summary, a bank match, a list of new equipment or unusual payments, and copies of any tax notices. If a receipt was missing, she marked it "to follow," rather than leaving a silent gap. She wrote three questions before each short meeting, and she left with written answers. She kept a year-end drawer from the first month, not from the last, and put the next meeting date on the shop calendar the same day she sent the pack. She asked her own adviser, and she kept that reply with the pack. These are examples, not promises.

## Arun in Hartford (example only)

Arun runs a small copywriting studio in Hartford. He agreed, in writing, what the accountant would file, and what Arun would still do himself. In this example he kept the weekly invoicing and the bank match, and the accountant reviewed the year, prepared the filing pack, and flagged questions. Before the year-end meeting he sent the pack five working days early, in this example, so the meeting was for decisions, not for opening attachments for the first time. He included a one-page story of the year. The figures here — a monthly pack, a meeting with three questions, a pack sent five working

days early — are examples of a rhythm, not a standard you must copy, and not a promise of a smoother tax bill. These are examples, not promises.

*Example figures, not targets or forecasts. General education, not financial, legal or tax advice. Results vary. These are examples, not promises. Figures in the video are rough examples, not targets or forecasts. This is general business education, not financial, legal, HR or tax advice.*

*Settings in the video: Des Moines and Hartford, USA. Official figures only; no currency amounts. Systex is our own product. You can find Systex at loftybiz.net. Click the link in the description.*