Your detailed monthly P&L review

A friendly 10–15 minute check-in for small-business owners

REPORTING MONTH

REVIEWED BY

BEFORE YOU START

Reconcile your accounts, capture the month's income and expenses, and clear major uncategorized items. In the workbook, mint cells are inputs and totals calculate automatically.

01 **Read the story**

Look at revenue, gross profit and net income. Did the business earn more than it spent?

02 **Compare the months**

What moved since last month? Look for large changes, one-time costs and seasonal patterns.

03 **Check the details**

Choose three to five lines that matter for your business: payroll, contractors, software, marketing or materials.

04 **Choose a next step**

Write down one or two actions: review a cost, investigate a margin change or clean up a category.

KEEP THESE TWO THINGS IN MIND

Profit is not the same as cash in the bank. Blank workbook cells count as zero once you enter data, so incomplete books can produce misleading results. Confirm accounting and tax treatment with your bookkeeper or accountant.

YOUR NOTES

What changed or surprised me?

My next action:

Question to confirm with a bookkeeper or accountant:

NEED A SECOND SET OF EYES?

BetterMint can help you build a clearer monthly reporting rhythm. **Explore BetterMint services → morebettermint.com/services**