BETTERMINT / FREE RESOURCE

Your monthly P&L review

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

BEFORE YOU START

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

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 3–5 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 DISTINCTIONS IN MIND

Profit is not the same as cash in the bank. Blank workbook cells are treated as zero in totals once you enter data—so incomplete books can produce misleading results.

NEED A SECOND SET OF EYES?

BetterMint can help you build a clearer monthly reporting rhythm and understand what the numbers are telling you.

YOUR NOTES

What changed or surprised me?

My next action:

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EDUCATIONAL RESOURCE
A template is not a substitute for professional accounting or tax advice.