

HOW TO GET YOUR BOOKKEEPING IN ORDER

RALEIGH WIRE
MARCH 2025

Presented by Catherine Dameron

HOW TO GET YOUR BOOKKEEPING IN ORDER

Introductions

Common Challenges

Key Bookkeeping Strategies

Bookkeeping Benefits



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Morgan Morrow Bookkeeping
Owner

WHY IS BOOKKEEPING TAKING A BACKSEAT?

Business Owners
Are Busy!

🔍 What are the solutions? ✕

Streamline

Simplify

Consistency

SEPARATE BUSINESS FROM PERSONAL

Open a business bank and credit card account.

Pay business expenses from business accounts.

Record business expenses paid from personal accounts.

What if an expense is partially business and partially personal?

Pay it from your personal account.



BOOKKEEPING SYSTEMS

Paper & Pencil
with a Shoe Box



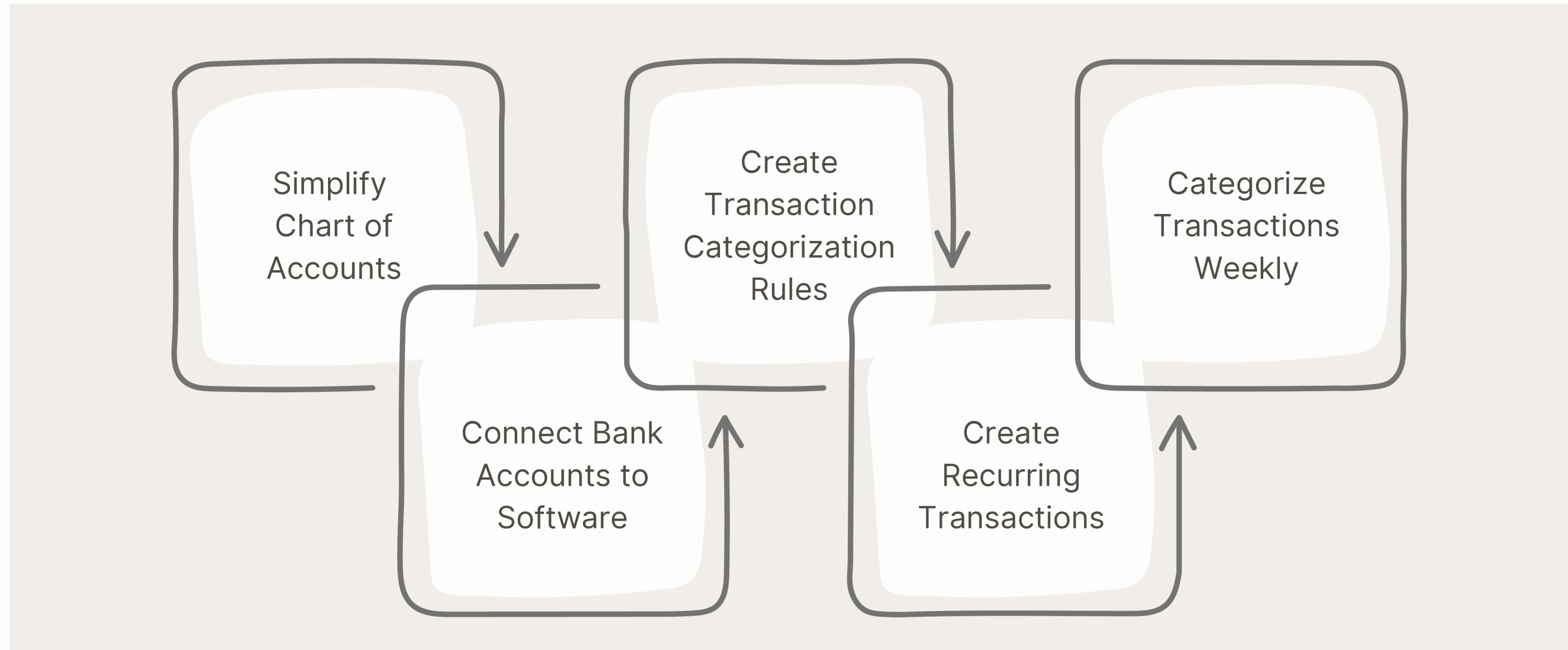
Spreadsheets &
Electronic Files



Accounting Software
& Electronic Files



ACCOUNTING SOFTWARE HAS BEEN PURCHASED NOW WHAT?



IT'S MONTH-END &
TRANSACTIONS ARE CATEGORIZED
NOW WHAT?

Reconcile Monthly
Bank and Credit
Card Statements

Clear Unreconciled
Transactions

Review Financial
Reports for
Variances

MY BOOKS ARE UP-TO-DATE & CLEAN



What's the benefit?

Financial Reports at Your Fingertips for Spot-On Decision-Making

Cash Flow Management and Forecasting

View Business Trends to Determine Pivots

Tax Strategy and Easy Hand-Off for Tax Preparation

Accurate Job or Project Tracking

Company and Job Budgets

Thank
you!

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