**Weekly & Monthly Sample Checklist**

These are a few suggestions to get you started on creating your weekly and monthly checklist. Personalize and make it your own based on the ideas and information included in *Building a Powerful Practice*.

* Enter client session information and income received daily. Maintain detailed transaction log: include date, client name, method of payment, etc.(Refer to Income & Expense template). Keep copies of payments per IRS regulations.
* Enter expenses as they occur. Maintain details of purchase (reason, date, etc.) Note on each receipt purpose of business expense. Keep copy of each receipt per IRS guidelines.
* Reconcile bank and credit card statements monthly.
* Tally income and expenses for the month.
* Return phone calls and emails from prospective clients, follow up as needed.
* Create and send newsletter content.
* Create posts on social media such as your newsletter, relevant articles, inspiring quotes/photos, etc.
* Add specific marketing tasks that you want to focus on to get new clients or bigger projects like creating a website.