

AVANOPTI FINANCIAL CLARITY CHECKLIST



Running a business requires more than hard work—it takes clear financial oversight to ensure growth and sustainability. This **Checklist** is your self-assessment tool to uncover potential gaps, risks, and opportunities. Answer each question honestly to gain valuable insights into your financial health and identify areas for improvement.

Here are the seven key questions every business owner should consider to build clarity and lead with confidence.

Do you have forward-looking cash flow forecasts and not just past reports?

(Planning ahead with visibility helps you make confident operational and investment decisions.)

- ☐ ☐ Yes
- ☐ ☐ No

Do you understand which products/services are actually profitable?

(Profitability analysis allows you to double down on what works and rework what doesn't.)

- ☐ ☐ Yes
- ☐ ☐ No

Do you know your monthly breakeven point and how close you are to it?

(Your breakeven point is a core metric for managing growth and sustainability.)

- ☐ ☐ Yes
- ☐ ☐ No

Have you stress-tested your business against loss of key clients or revenue streams?

(Scenario planning builds financial resilience and prevents panic-driven decisions.)

- ☐ ☐ Yes
- ☐ ☐ No

Do you review strategic financial insights at least quarterly with a qualified advisor?

(Data without interpretation is noise. Strategic conversations lead to informed decisions.)

- ☐ ☐ Yes
- ☐ ☐ No

Are your financial reports clear, timely, and aligned with your business goals?

(Clean and aligned reporting empowers better leadership and stakeholder communication.)

- ☐ ☐ Yes
- ☐ ☐ No

Next Steps

If you answered 'No' to one or more of these questions, it might be time to take a closer look at your financial oversight. Understanding your financial position is crucial for sustainable business growth.

Ready for a Deeper Dive?

Schedule a free consultation with Avanopty today to discuss your results and explore how we can help you achieve greater financial clarity and strategic growth. Our experienced team can provide tailored solutions to address your specific needs and challenges.

Contact us at 869-760-0818 or visit our website at www.avanopty.com to book your free consultation.