

STEINGARD

FINANCIAL

Getting QBO Ready for a Bookkeeper

- ✓ Add all bank accounts to QBO
- ✓ Gather all PDF Bank Statements in Google Drive or Dropbox
- ✓ Create a list of Contractors & Vendors in QBO or Excel
- ✓ What Payroll system delegated access and info about team pay structure
- ✓ Describe how you use your accounts & common transactions