

Financial Health Check - What's Involved?

Gain clarity and control over your business finances with a structured, expert-led review.

Who This Report Is For:



Business Owners & Founders seeking financial clarity before big decisions, and entrepreneurs relying on bookkeepers who need an independent accuracy review.

What the Report Covers:



- ✓ Accuracy Check – Are your numbers correct?
- ✓ Compliance Review – Are you meeting tax & financial obligations?
- ✓ Process & Automation Score – Are you working efficiently?
- ✓ Policy & Controls Assessment – Are you minimizing financial risks?

👁️ **Plus: Actionable recommendations to strengthen your financial position.**

Why This Report Matters:



If your accounts aren't accurate, compliant, and structured, you risk:

- ✗ Making decisions based on wrong financial data.
- ✗ Overpaying tax, suppliers, or employees.
- ✗ Running into cash flow problems or HMRC issues
- ✓ A Financial Health Check ensures your numbers are trustworthy, so you can make confident decisions.

How it will benefit your business?



- ✓ Identify weaknesses in the accounts.
- ✓ Gain expert financial insights.
- ✓ Plan for growth confidently.

How It Works - Your Journey



Complete Booking

- ✓ Choose a time and complete a short intake form.
- ✓ If you don't book right away, we'll follow up with helpful insights.

30 min free Assessment Call

- ✓ Explore your financial challenges with an expert accountant.
- ✓ Identify which Health Check package—Lite, Pro, or 360—fits your needs.



Proposal

- ✓ We send you a proposal live during the call for review.
- ✓ You confirm receipt and move forward when ready.



Secure Data Collection

- ✓ Receive clear instructions to securely upload documents and grant system access.

Diagnosis Begins

- ✓ We analyze your numbers using Dext Precision.
- ✓ Pro & 360 clients complete a second form covering business processes.



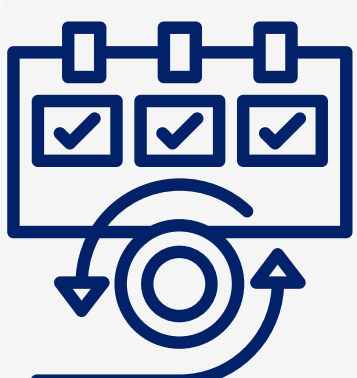
Receive Your Financial Health Report

- ✓ Get a detailed, easy-to-understand report with your financial health score, risks, and recommendations.



Review & Plan Your Next Steps

- ✓ Walk through your results in a review meeting with expert insights.
- ✓ If needed, we'll guide you toward cleanup, catchup, or an ongoing financial partnership to keep you on track.



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