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FINANCIAL

2025 SMALL BUSINESS OWNER'S

TAX & FINANCE ORGANISER GUIDE



*For Last-Minute Jugglers: Stay Ahead,
Stress Less, and Take Control*



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Message from the Founder



Sam Jackson

Founder, Lelo Financial

Time to Stop Letting Tax Deadlines Sneak Up on You

If you find yourself scrambling to meet tax deadlines, hunting for paperwork at the last minute, or feeling stressed about unexpected tax bills—you're not alone.

This guide will show you how to prepare for tax season with ease, avoid financial admin chaos, and create stress-free money habits that actually stick.

Why staying organised matters:

No Bottlenecks

No more last-minute rush to get tax over the line.

Fewer Skeletons

Set money aside automatically so tax time never catches you off guard.

Less Effort

A few simple systems now will save you hours later.

Smarter Decisions

When you know your numbers, you can plan ahead with confidence.

Why You're Always Scrambling at the Last Minute

Understand the Root Causes of Last-Minute Tax & Finance Stress

No System for Tax Savings

The Problem: You don't regularly set aside money for taxes, so when the bill arrives, you're left scrambling to cover it.

- ✗ Tax feels like a surprise expense rather than a planned part of business.
- ✗ You use all incoming cash for expenses instead of saving a portion for tax.
- ✗ When tax is due, you panic and try to find the money at the last minute.

Procrastination & Avoidance

The Problem: Tax and finance tasks feel overwhelming, so you put them off—until you have no choice.

- ✗ The thought of looking at financial numbers makes you anxious.
- ✗ You delay admin tasks because they seem boring, complicated, or time-consuming.
- ✗ The longer you wait, the worse it gets—leading to last-minute panic.

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No Consistent Finance Routine

The Problem: You don't check in on your finances regularly, which means issues pile up until they become urgent.

- ✗ Receipts, invoices, and expenses are scattered and unorganised.
- ✗ You don't have a set time each week or month to review finances.
- ✗ Tax season is a massive headache because you're sorting a year's worth of data at once.

No Visibility on Deadlines

The Problem: You're reacting to tax deadlines instead of planning ahead.

- ✗ You don't track when taxes, bills, or supplier payments are due.
- ✗ You miss deadlines or pay late fees unnecessarily.
- ✗ You're constantly chasing paperwork at the last minute.



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The Fix

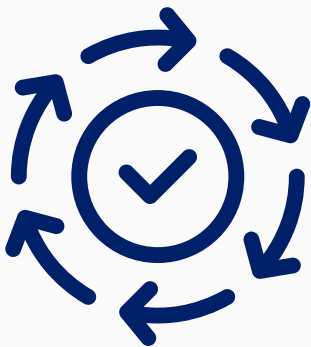
You're only three steps away from organised finances!



Step 1 - Know Your Deadlines

The tax year starts on 06 April, and you have nine months to prepare your return for the previous twelve month's trading.

Set a schedule to finalise your income by May 31st, and your expenses by June 30th. And file your return in September, five months early!



Step 2 - Get Atomic Habits

Get into the mindset of 'Atomic Habits' because daily discipline is the path to financial freedom.

Begin by scheduling a weekly 15-minute routine to review income and expenditure for the week. Spreadsheets are the cheapest solution.



Step 3 - Automate Savings

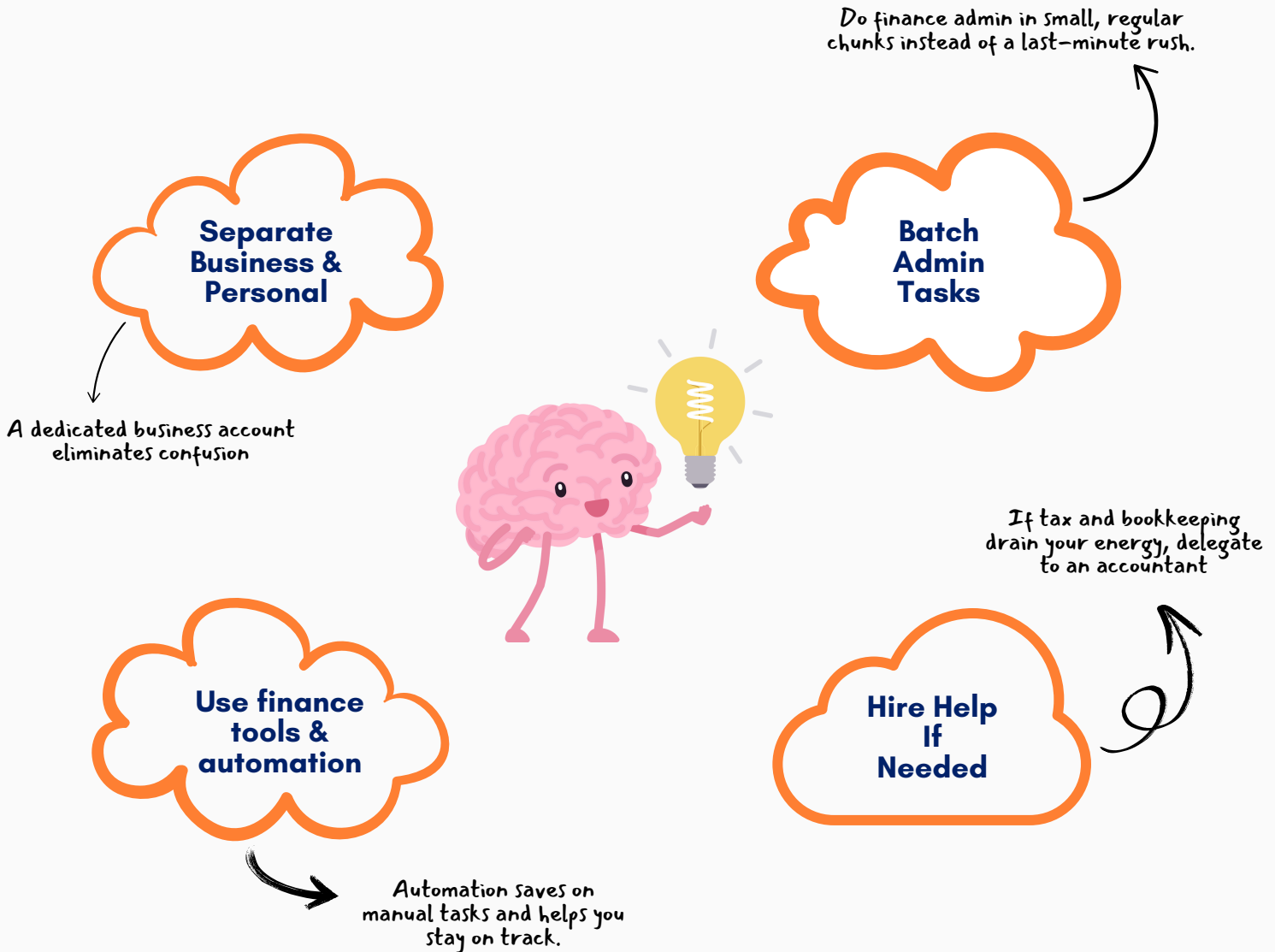
Make an estimate of your next tax bill. If you're already filing tax returns, you might use last year's tax bill as a starting point.

If it's your first self employed year, or your trading has changed, a good starting point is 20% of income.

Create a weekly or monthly auto transfer to savings.

Smart Finance

Systems to Use Right Now



Final Thoughts

- 💡 Tax & finance don't have to be overwhelming—a few simple tweaks can make all the difference.
- 💡 Automate, organise, and stay ahead so tax deadlines never catch you off guard again.
- 💡 Take the first step today, and future you will thank you!

Now, go get organised! 🚀

More Information About Us



Data-Driven Business Decisions

Who We Help:

At Lelo Financial, we help small business owners and growing companies who want clarity on their finances, not just compliance numbers.

What We Do:

We provide practical accounting, strategic financial insights, and profitability coaching, turning numbers into decisions—so you can build a profitable, sustainable business without stress or confusion.

How We Work:

- Straightforward, jargon-free advice.
- Clear financial strategies to increase margins and cash flow.
- Personalized support that grows with your business.

Let's Fix Your Profitability!

Ready to take control of your numbers and build a more profitable business? Get in touch today!



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