



Year-End Checklist

- Remind employees to review W-4s
- Verify workers' names and SSNs
- Gather W-2 information
- Hold performance reviews
- Hand out bonuses
- Request contractors' TINs
- Get your books in order
- Examine financial documents
- Talk with your tax advisor
- Buy supplies for next year
- Make a contribution to charity
- Review vendor contracts
- Thank your loyal customers
- Revisit your marketing plan
- Review your website
- Review insurance policies
- Set goals