



Year-End Bookkeeping Checklist for Pet Industry Professionals

Ensure your bookkeeping is organized and ready for tax season. This checklist covers essential steps for pet care businesses.

1. Email *

2. What is the primary structure of your business?

Mark only one oval.

- ☐ Sole Proprietorship
- ☐ Partnership
- ☐ LLC (Single Member)
- ☐ LLC (Multi-Member)
- ☐ S Corporation
- ☐ C Corporation
- ☐ Other

3. Review and Reconciliation of Financial Accounts

Check all that apply.

	Completed	In Progress	Not Applicable
Reconciled all bank accounts (checking, savings)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reconciled all credit card accounts	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reviewed and categorized all transactions for the year	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Ensured all receipts for major expenses are filed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Pet Care Specific Revenue and Expense Review

Check all that apply.

- ☐ Confirmed revenue from all services (grooming, boarding, walking, products)
- ☐ Verified expenses for pet supplies and inventory (food, toys, medication)
- ☐ Tracked and recorded expenses for specialized equipment (e.g., grooming tables, kennels)
- ☐ Recorded miles driven for business-related pet services (e.g., house calls, supply runs)
- ☐ Accounted for donations made to animal shelters or rescues

5. Client and Employee Documentation

Check all that apply.

- ☐ Confirmed all W-9s or W-8BENs for independent contractors (e.g., freelance groomers, walkers)
- ☐ Verified total amounts paid to independent contractors for 1099 form preparation
- ☐ Ensured all payroll records and tax payments for W-2 employees are accurate
- ☐ Updated client contact and payment information

6. Inventory Valuation (if applicable, e.g., pet product sales)

Mark only one oval.

- ☐ Completed a physical count of ending inventory
- ☐ Valued inventory using LIFO, FIFO, or Average Cost method
- ☐ Not Applicable (No Inventory)

7. Review of Accounts Receivable (Outstanding Client Invoices)

Mark only one oval.

	0	1	2	3	4	5	
Mar	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	All invoices collected (100%)

8. Estimated Time Needed to Finalize Year-End Bookkeeping

Example: 4:03:32 (4 hours, 3 minutes, 32 seconds)

9. How would you rate your confidence in your current bookkeeping records being ready for tax filing?

1 2 3 4 5



10. Date of planned submission to your CPA/Accountant

Example: January 7, 2019

11. Notes or specific issues encountered during this review:
