



Tax-Pros

YOUR SOURCE FOR TRUSTED TAX PREPARATION

Small Business
PLANNER BUNDLE

This Planner Belongs To

Business Overview

Name:	Phone:	Address:
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Email:	Website:
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About	Social Media Handle	
		
		
		
		
		

Gender:	Income:	Marital Status:	Age Range:
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Children : Yes No	Location:	Interests:
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Daily Plan

Date:

Daily Focus:

[illegible]

Daily Review

TOP 5 ACCOMPLISHMENTS

DATE:

WHAT DID I DO WELL ?

WHAT I NEED TO IMPROVE ?

LESSONS LEARNED

GRATEFUL FOR

DAILY SUMMARY

DAILY SCORE

HOW CAN NEXT DAY BE BETTER ?

Weekly Plan

Month:	Year:
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Week 1:	
Week 2:	
Week 3:	
Week 4:	

Top Priority Goals	Focus This Month

Weekly Review

TOP 5 ACCOMPLISHMENTS

DATE:

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WHAT DID I DO WELL ?

WHAT I NEED TO IMPROVE ?

LESSONS LEARNED

GRATEFUL FOR

WEEKLY SUMMARY

WEEKLY SCORE

HOW CAN NEXT DAY BE BETTER ?

Monthly Planner

Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				
Sunday				

Monthly Review

This Month I Achieved

What Worked

What Didn't Work

Do More Work

Do Less of

Monthly Budget

Income			Expenses	
Income-1			Month	
Income-2				
Other Income			Budget	
	Total Income			

Bill to be paid	Due date	Amount	Paid	Notes

Notes

Monthly Calendar

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday

To-Do List

Notes

Monthly Set Task

Important

Not Important

To Do List

[illegible][illegible][illegible][illegible]

Annual Finance

Month	Income	Expenses	Savings
January			
February			
March			
April			
May			
June			
July			
August			
September			
October			
November			
December			
Total			

Annual Overview

YEAR:

JANUARY

FEBRUARY

MARCH

APRIL

MAY

JUNE

JULY

AUGUST

SEPTEMBER

OCTOBER

NOVEMBER

DECEMBER

Personal Finance Tracker

MONTH OF: _____

Monthly Income			
Income	Planned	Actual	Diference

[illegible]

Monthly Balance			
	Estimated	Actual	Difference
Income			
Expenses			
Total Left			

[illegible]

Habit Tracker

Week of:

Habit	Sun	Mon	Tue	Wed	Thu	Fri	Sat

Important Meeting

[illegible]

To-Do Business

Important

Not Important

Product Planner

Product Name:

Budget:

Total Expenses:

Profit:

Supplies Needed

Checklist

Description

Notes

New Product Planner

Name:

Type:

Price:

Duration:

Go Live:

Top Keywords

Inspiration

Notes

Description

New Product List

Category

Category

Category

Category

Product Evaluation

Top Sellers	QTY	Price	Why did it work

Top Sellers	QTY	Price	Why did it work

Top Sellers	Top Sellers

Packaging Planner

Product	Packaging Supplies			
Weight:	Name	Supplier	Cost	Notes
Length:	_____	_____	_____	_____
Height:	_____	_____	_____	_____
Depth:	_____	_____	_____	_____

Product	Packaging Supplies			
Weight:	Name	Supplier	Cost	Notes
Length:	_____	_____	_____	_____
Height:	_____	_____	_____	_____
Depth:	_____	_____	_____	_____

Product	Packaging Supplies			
Weight:	Name	Supplier	Cost	Notes
Length:	_____	_____	_____	_____
Height:	_____	_____	_____	_____
Depth:	_____	_____	_____	_____

Product	Packaging Supplies			
Weight:	Name	Supplier	Cost	Notes
Length:	_____	_____	_____	_____
Height:	_____	_____	_____	_____
Depth:	_____	_____	_____	_____

Suppliers List

[illegible]

Goals Tracker

Goal	Action Steps	Deadline	Done
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐
			☐

Goals Planner

Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.
Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.
Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.
Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.
Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.
Goal	Steps to task
	1.
	2.
	3.
Deadline:	4.
Achieved ☐	5.

Goal Action Plan

Goal

Start Date:

End Date:

Goal Progress:

☐	☐	☐	☐	☐	☐
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Action Steps

Possible Obstacles

How To Overcome Obstacles

Seasonal Idea

January	February	March
April	May	June
July	August	September
October	November	December

Improvement Planner

Action

Result

Action

Result

Action

Result

Campaign Tracker

Month:

[illegible]

Inventory Log

Date	Item	Made to Order	QTY	Cost	Price	Profit

Notes

Customer Follow Up List

[illegible]

Advertisement Tracker

Start Date	End Date	Price	Results	Platform

Budget Spreadsheet

Income	Over or Under	Actual	Estimate
Total			

Invoice

Name:

Address:

Invoice:

Invoice Date:

Bill To:

Due Date:

Product Name	Affiliate Link	Price	Commission %

Shipping Tracker

[illegible]

Order Form

Customer Details	
Name:	Address:
Phone:	Customer Note:
Email:	

#Item	Description	Quantity	Unit Price	Total

Shipping Details
Shipping Method:
Date Shipped:
Tracking

Subtotal
Tax:
Shipping:
Discount:
Total:

Order Tracker

[illegible]

Sales Tracker

Month:

[illegible]

Income Tracker

Date:

[illegible]

Profit Tracker

[illegible]

Profit & Loss Tracker

[illegible]

Coupons & Discounts

[illegible]

Monthly Bill Tracker

[illegible]

Expense Tracker

[illegible]

Return Tracker

[illegible]

Post Planner

Post Title:

Topic:

Platform:

Publish Date:

Description

Checklist

Hashtag

Links to Include

Notes

Facebook Post Planner

Post	Post Number
	Date

Notes

Post	Post Number
	Date

Notes

Password Tracker

Website:

Username:

Password:

Notes:

Website:

Username:

Password:

Notes:

Website:

Username:

Password:

Notes:

Website:

Username:

Password:

Notes:

Contact List

Name:

Phone:

Email

Address:

Name:

Phone:

Email

Address:

Name:

Phone:

Email

Address:

Name:

Phone:

Email

Address:

Social Media Planner

Week of:

Day	Platform	Post	Time	Stats
Sunday				
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				
Saturday				

Product Evaluation

Top Sellers	QTY	Price	Why did it work

Worst Sellers	QTY	Price	Why did it work

Start Doing	Stop Doing

Online Statistics

	Total Views	Subscribers						
January								
February								
March								
April								
May								
June								
July								
August								
September								
October								
November								
December								

	Total Orders	Total Revenues	Total Sellers	Worst Sellers	Traffic Source
January					
February					
March					
April					
May					
June					
July					
August					
September					
October					
November					
December					

Hashtag Research

Topic:

Hashtag	Reach

Topic:

Hashtag	Reach

Topic:

Hashtag	Reach

Hashtag

Reach

Hashtag

Reach

Hashtag

Reach

Notes

Campaign Manager

	Description:
Campaign Name:	
Launch Date:	
Platform:	
Budget:	
Actual Spend:	
Campaign Result: Successful ☐	

	Description:
Campaign Name:	
Launch Date:	
Platform:	
Budget:	
Actual Spend:	
Campaign Result: Successful ☐	

Advertising Tracker

Month:

[illegible]

Important Date

Notes

[illegible]

[illegible]

Doodle