



www.SyncopateLeadership.com



GIVING ENTREPRENEURS THE
FINANCIAL CONFIDENCE TO **GROW**

WHAT WE DO

Focusing on **ENTREPRENEURS**, we offer fractional accounting services ranging from **CFO leadership**, **Financial Planning and Analysis**, to **Controllership**, **Accounting Services** and more.

Syncopate ensures you, as an Entrepreneur, are fully positioned to create economic and social impact in the world – building a **LEGACY** upon which future generations will thrive.

[Read more about our ethos here.](#)

HOW TO SET UP YOUR ACCOUNTING SYSTEM

Setting up and maintaining an accounting system is an integral part of running a business. Your accounting system should be the basis for the key financial metrics you use to assess the health of your business. It is also should contain the information required to comply with your payroll, sales tax and income tax obligations. Many entrepreneurs choose to look after their own accounting, which can make sense for a savvy person with the time to devote to this crucial activity. Modern cloud-based accounting systems designed for smaller businesses can make the task easier with their automated features. We've created this checklist to guide you through the process.

- Choose your software plan and subscribe
- Follow the set-up wizard or guide
- Input your company details
- Customize your chart of accounts
- Connect your bank account
- Create your sales tax settings
- Create invoicing template(s)
- Connect any integrated apps (e.g. billing, payments, payroll)
- Download the app for your device
- Regularly sign in to review and add new transactions
- Set up rules to automate repeating transactions
- Use the app to take photos of receipts before you forget or lose them

We can help with this! Contact us at info@SyncopateLeadership.com to find out how.



**A VERSATILE AND EXPERIENCED FINANCE TEAM
AVAILABLE TO YOUR SMALL TO MID-SIZED
BUSINESS ON A FRACTIONAL BASIS.**

"Syncopate's support in automating some of our key business processes resulted in significant time savings on a weekly, monthly and annual basis. As an entrepreneur, having these tasks off my plate freed me up to keep my focus on my business."

Ana Belic, Founder & President
GTA Photography Classes