



PROFIT CLARITY CHECKLIST

A simple tool to reveal where your money's really going

You Can't Grow What You Can't See

Your business lives across platforms, payment processors, and brand deals - but your profit hides between the lines. This checklist helps you untangle your income and expenses so you can finally see what's working.

Tip: Don't aim for perfect numbers today—aim for visibility.
Clarity comes first.

Step 1: Income Clarity

List every source of income. Check off the platforms you use, then jot down your average monthly total.

Platform	Est. Monthly Total
Shopify / Etsy / Amazon	
PayPal / Stripe / Square	
TikTok / Instagram brand deals	
Affiliate payouts	
Patreon / Substack / Memberships	
Other (digital products, consulting, etc.)	
TOTAL MONTHLY INCOME	

If the totals surprise you, that's a good thing—it means you're seeing your real ecosystem.

Expense Clarity

Every dollar has a job. Let's see where it's working and where it's wandering off.

Category	Est. Monthly Total
Operations (Platform fees, shipping, software) Shopify / Etsy / Amazon	
Marketing (Ads, influencers, promos)	
Production (Materials, equipment, editing)	
Admin (Legal, insurance, office supplies)	
TOTAL MONTHLY INCOME	

Hidden leaks add up. If it auto-renews, it deserves a line item.

Step 3: Your Profit Snapshot

Find Your True Profit.

Total Income

—

Total Expenses

=

ACTUAL PROFIT

If your profit margin is under 25%, review recurring expenses. If it's 40% or more, celebrate!

Keep the Momentum

Small Steps, Big Payoff.

Connect all payment platforms in one dashboard.

Schedule a 15-minute weekly money review

Keep business/personal accounts separate.

Save 25-30% of profit for taxes.

You just took the hardest step - getting clear.

[Book your free Profit Review Call](#)