



BELAY'S

BLUEPRINT

FOR GROWTH:

TOP FINANCIAL TIPS FOR SUCCESS



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Running a successful organization means juggling a lot of priorities at once — you're managing a team, serving clients, and keeping operations moving forward.

It can be easy to let the financial side of things slip, but without a strong financial foundation, even the most successful plans face setbacks.

Wondering if you need to invest more time in your finances?

Ask yourself:

1. Are you constantly stressing about unpredictable market conditions?
2. Is securing funding or financing starting to feel like an uphill battle?
3. Are you struggling to maintain a steady cash flow?

If the answer is yes to any of these, you're not alone.

From rising costs to delayed payments, every small business faces financial challenges — but with the right support, stability is possible.

3 ESSENTIAL FINANCIAL REPORTS EVERY BUSINESS OWNER SHOULD KNOW

Understanding your financial position is key to making smart decisions and sustaining long-term growth.

That's why BELAY created these three essential templates to help you track, analyze, and act on your business's financial data:

Statement of Profit & Loss

Also known as an income statement or P&L, this report tracks revenue and expenses to assess profitability — monthly and annually.

Knowing your profit margins helps you identify cost-saving opportunities and set realistic growth goals. Plus, a well-maintained P&L is essential for securing funding and maintaining investor confidence.

BELAY			
[Your business Name]			
Address 123 Street Avenue, Cityville, State 12345			
Profit and Loss Report			
	Year 1	Year 2	Year 3
Net Sales	\$1.00	\$2.00	\$3.00
Other Revenue	\$1.00	\$2.00	\$3.00
Cost of Goods Sold (COGS)	\$1.00	\$2.00	\$3.00
Total Revenue	\$2.00	\$4.00	\$6.00
Cost of Goods Sold (COGS)	\$1.00	\$2.00	\$3.00
Operating Expenses	\$1.00	\$2.00	\$3.00
Selling & Marketing Expenses	\$1.00	\$2.00	\$3.00
Administrative Expenses	\$1.00	\$2.00	\$3.00
Depreciation & Amortization	\$1.00	\$2.00	\$3.00
Total Operating Expenses	\$1.00	\$2.00	\$3.00
Operating Profit (Loss)	\$1.00	\$2.00	\$3.00
Total Expenses	\$1.00	\$2.00	\$3.00
Other Non-Operating Expenses	\$1.00	\$2.00	\$3.00
Total Other Expenses	\$1.00	\$2.00	\$3.00
Total Expenses	\$1.00	\$2.00	\$3.00
Net Profit	\$1.00	\$2.00	\$3.00

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Balance Sheet

This snapshot shows your business's overall financial health by detailing assets, liabilities, and equity.

A business can show a profit and still be in trouble if debt outweighs earnings. Your balance sheet helps you evaluate financial stability, spot trends, and make informed decisions about growth and investment. It's also a key report lenders review when evaluating creditworthiness.

Cash Flow Statement

This report tracks the cash coming in and going out, helping ensure you have enough liquidity to cover daily operations.

More importantly, it helps you forecast future cash flow — critical for avoiding shortfalls. [One study](#) found that 82% of small businesses that fail are brought down by poor cash flow management.



[DOWNLOAD A CUSTOMIZABLE TEMPLATE HERE](#)

These reports will help you make better decisions for the future of your business, but we want to let you in on a little secret: It doesn't have to all fall on you.

A financial expert can take these reports and more off your plate, and you'll have the peace of mind that they are done right — the first time.

“

I've been informed because of the accuracy of the reports, and I think that's just so much more important than having tasks completed. It's about being able to make those data-driven decisions and not just winging it.

Donyelle Clark-Kennedy
CEO and Clinical Director at Rise Behavioral Services

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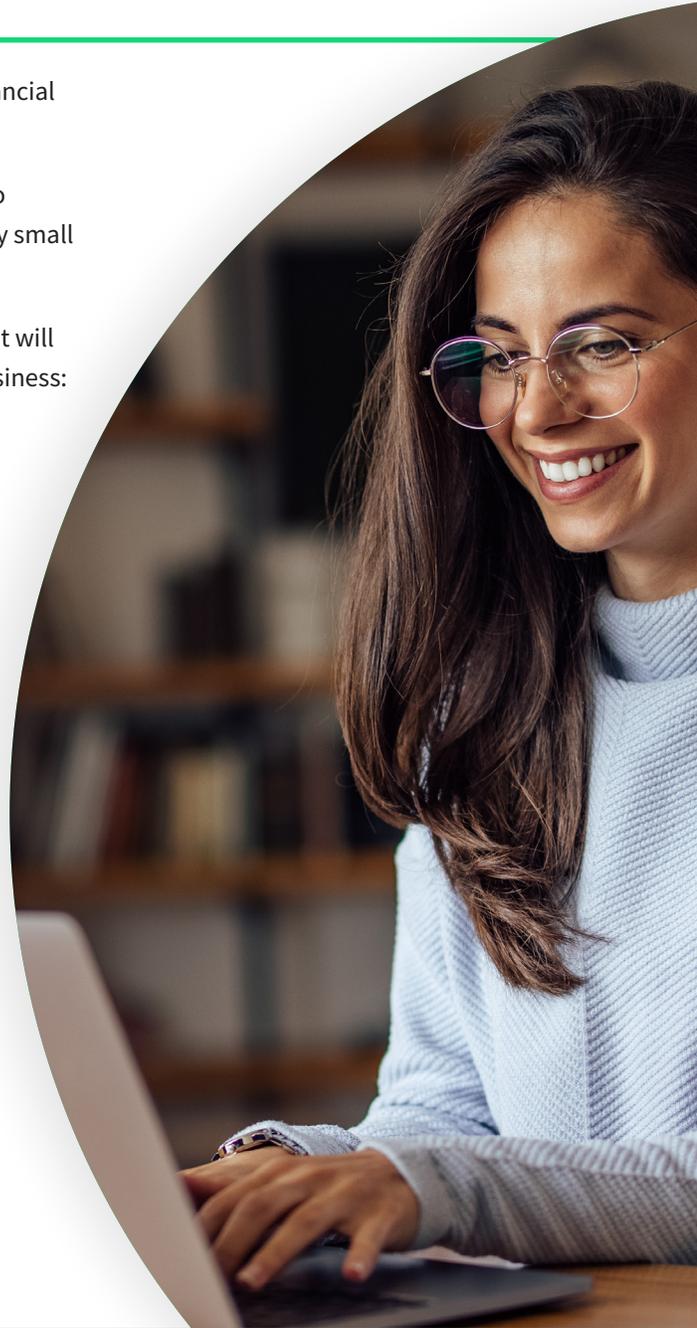
10 TASKS YOU CAN DELEGATE TO A BELAY FINANCIAL EXPERT

Delegation is one of the most effective skills you can master for the financial health of your business.

It not only gives you more time to focus on what you do best, but it also invites experts into the areas where you feel less comfortable. For many small business owners, finances are one of those areas.

Here are some of the top tasks a BELAY Financial Expert can handle that will bring more time, expertise, and peace of mind to your construction business:

-  Weekly Bill Pay
-  Correcting Journal Entries
-  Monthly Bank Account Reconciliations
-  Weekly & Monthly Reports
-  1099 Preparation & E-Filing
-  Credit Card Reconciliations
-  Payroll Processing Through A Verified Vendor
-  Invoice Processing (If Applicable)
-  Updating Annual Budget In Accounting Software
-  Maintain Vendor Lists



“

Leaders need to know their strengths and spend the majority of their time doing in the business what they're strong at... I'm not weak at finance. But my best and highest use is being with people out on the front lines, on Zoom, or on calls. So BELAY has leveraged me as a leader by putting me in my zone where I need to be.

Keith Cupp
Founder and Head Coach of Gravitas Impact

”

Take Control of Your Financial Future with BELAY

Partnering with a BELAY Financial Expert means:

Financial Clarity & Strategy – Gain the insights needed to protect your business from economic uncertainty.

Expertise & Accuracy – Avoid costly financial mistakes with professional bookkeeping and accounting services.

More Time for What You Do Best – Focus on running your business, managing your team, and delivering quality for your clients — all while knowing your finances are in expert hands.

Ready to build a strong financial future?

[SCHEDULE A CALL](#)

[Schedule a call](#) with BELAY today to learn how an experienced BELAY Financial Expert can help your business thrive.

“

Growth is a good thing, but it does present its own challenges. You have to ask, 'How do I grow in a smart and efficient way?' In a smaller organization like ours — where we are relatively new but large enough to have a lot of moving parts — BELAY [Financial Solutions] is the sweet spot.

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Brandon Gossett

Director of Operations at Awake Ministries



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