

Important:

- 1.) You will be entering annual revenue and expenses from 2019, 2020, and 2021.
- 2.) Please prepare your data in advance of entering it into the form below. A printable PDF version of this form is available for your convenience. [CLICK HERE.](#)
- 3.) Please submit your data no later than August 8, 2022.
- 4.) If you have any questions, please contact StephanieK@AtticusAdvantage.com and SamanthaL@AtticusAdvantage.com.

Annual Gross Revenue *

Gross collected revenue for legal services. Includes revenue from each practice area. Ancillary revenue from related business activities, such as financial services, should not be included. Includes stimulus payments received (PPP).

2019	2020	2021
<input type="text"/>	<input type="text"/>	<input type="text"/>

Office Expenses/Rent *

Office/Lease, Telephone, Internet, Office Supplies, Postage, Courier Services, Utilities, Parking, Landscaping, Property Taxes, Common Area Maintenance (CAM), and Janitorial Service.

2019	2020	2021
<input type="text"/>	<input type="text"/>	<input type="text"/>

Technology *

Practice Management Software, Cell Phones, Cellular Data Plan, Website Hosting, Online Legal Research, Office Suite Software, Document Assembly Software, Computers & Associated Hardware, Equipment Rental, Equipment Maintenance/Repairs, Estate Planning Software (e.g., WealthCounsel, ElderCounsel), and Tech Support Contracts.

2019	2020	2021
<input type="text"/>	<input type="text"/>	<input type="text"/>

Business Insurance *

Professional Liability Insurance, Workers' Compensation, and Other Insurance.

2019

2020

2021

License & Professional Dues *

Business License, Bar license, State/Local Bar Dues, CLE, Other Dues, and Local Licenses (i.e., city, county, etc.)

2019

2020

2021

Payroll Expenses (Non-Owner) *

Non-Owner Salary (Staff), Payroll Service, Independent Contractors, Virtual Receptionist, and 401(k) Administration Fee.

2019

2020

2021

Owner(s) Compensation *

Owner(s) Salary (W-2)

2019

2020

2021

Owner(s) Special Benefits *

Vehicle Expenses, Personal Assistant, Travel, Perks, Retirement/401(k) and Other Personal Expenses (includes any spouse, children, or non-production family members).

2019

2020

2021

Health Insurance *

Insurance that covers the whole or a part of medical expenses. Includes individual and/or group (staff) Health Insurance.

2019

2020

2021

Marketing & Business Development *

Inbound Marketing Campaigns, Digital Marketing/Copywriting, Graphic Designer, Software that aids in Marketing, Marketing Courses, Direct Mail Expense, Digital Marketing Management, Client Development Related Expenses including Meals, Travel, and Gifts, Sponsorships, and Business Travel.

2019

2020

2021

Advertising *

Google AdWords, Social Media Ads, Print Media, Billboards, Television Commercials, Radio, and Other Forms of Advertising.

2019

2020

2021

Banking/Finances *

Bank Fees, Merchant Fees, Finance Charges, Payments toward Bank Loans, and Lines of Credit Payments.

2019

2020

2021

Outside Professional Services *

Legal, CPA, Accounting, Contractors, Consultant Fees, and Other Professional Fees.

2019

2020

2021

Membership/Coaching *

Memberships (e.g., Atticus, AAML) and Business Coaching/Training.

2019

2020

2021

Other *

Charitable Donations, Political Contributions, and Other Expenses.

2019

2020

2021

Net Profit (pre-tax) *

Gross revenue minus expenses.

2019

2020

2021

Submit

Save and Continue Later