



# KNOW YOUR NUMBERS – STEP 3

HOME / KNOW YOUR NUMBERS – STEP 3

## Important:

- 1.) You will be entering annual revenue and expenses from 2022.
- 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 November 30, 2023.
- 4.) If you have any questions, please contact [StephanieK@AtticusAdvantage.com](mailto:StephanieK@AtticusAdvantage.com) and [SamanthaL@AtticusAdvantage.com](mailto: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).

2022

### Office Expenses/Rent \*

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

2022

### 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.

2022

### Business Insurance \*

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

2022

**License & Professional Dues \***

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

2022

**Payroll Expenses (Non-Owner) \***

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

2022

**Owner(s) Compensation \***

Owner(s) Salary (W-2)

2022

**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).

2022

**Health Insurance \***

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

2022

**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.

2022

**Advertising \***

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

2022

**Banking/Finances \***

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

2022

**Outside Professional Services \***

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

2022

**Membership/Coaching \***

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

2022

**Other \***

Charitable Donations, Political Contributions, and Other Expenses.

2022

**Net Profit (pre-tax) \***

Gross revenue minus expenses.

2022

**Submit**

Save and Continue Later