



# KNOW YOUR NUMBERS – STEP 3

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## 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](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).

2019	2020	2021	2022
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### 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	2022
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### 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

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**Business Insurance \***

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**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

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

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

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**Owner(s) Compensation \***

Owner(s) Salary (W-2)

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**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

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**Health Insurance \***

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### 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

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### Advertising \*

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### Banking/Finances \*

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### Outside Professional Services \*

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### Membership/Coaching \*

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

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

### Other \*

Charitable Donations, Political Contributions, and Other Expenses.

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

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

Gross revenue minus expenses.

2019

2020

2021

2022

\*\*\*Answer "N/A" if data for the year is not available.\*\*\*

**Submit**

Save and Continue Later