



KNOW YOUR NUMBERS – STEP 3

HOME / KNOW YOUR NUMBERS - STEP 3

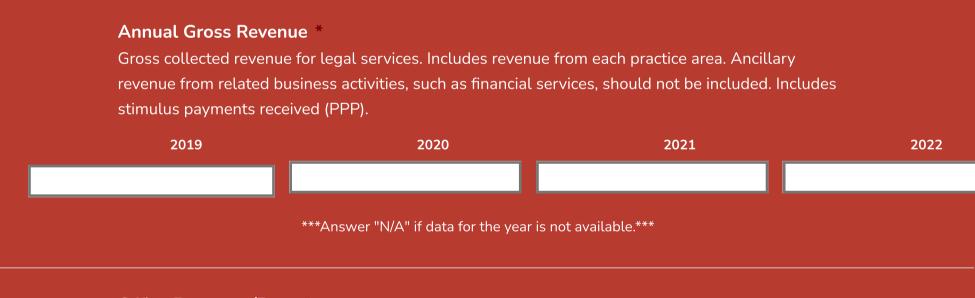
Important:

1.) You will be entering <u>annual</u> 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.

3.) Please submit your data no later than August 8, 2022.

4.) If you have any questions, please contact StephanieK@AtticusAdvanatge.com and SamanthaL@AtticusAdvantage.com.



Office Expenses/Rent

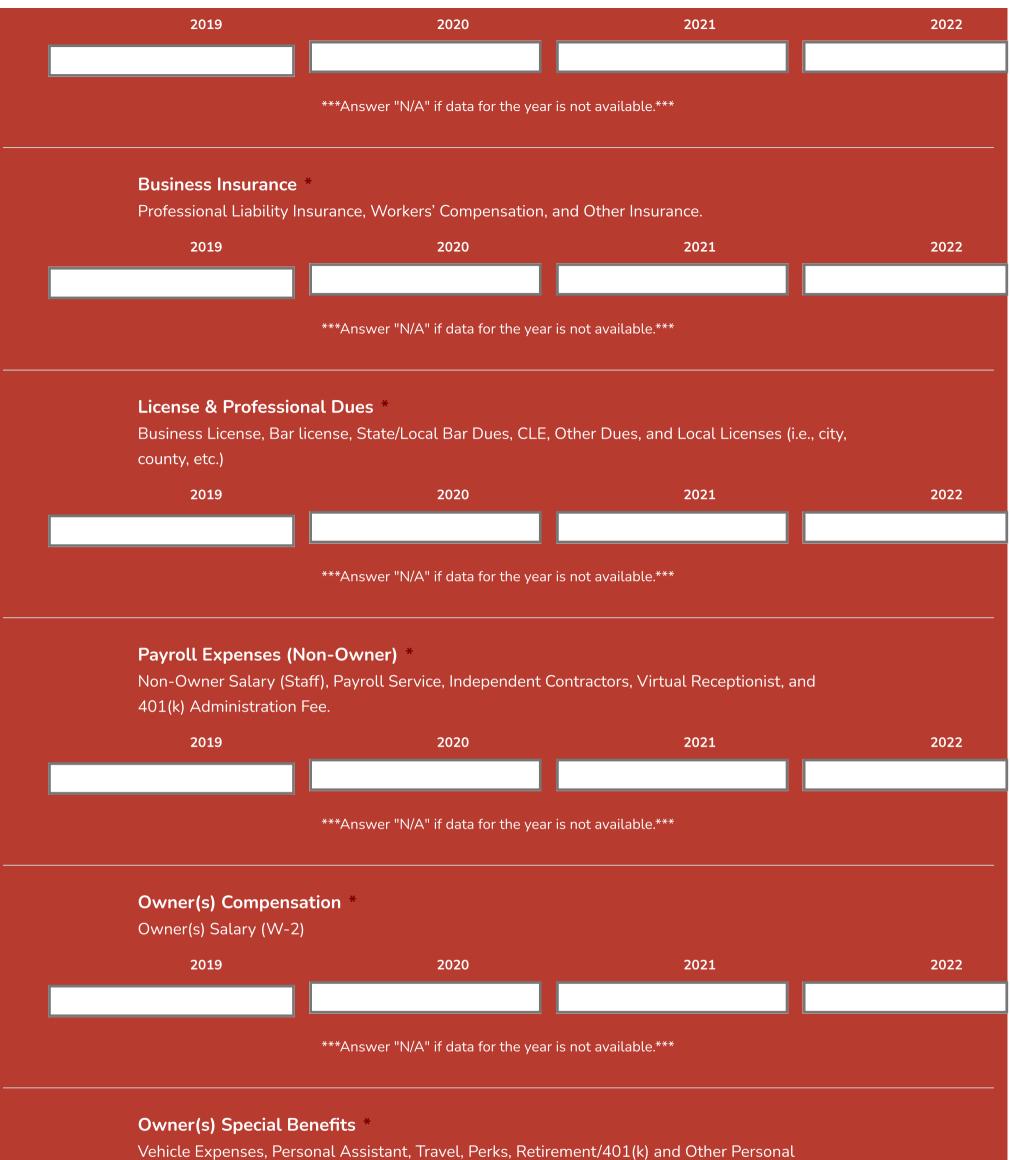
Office/Lease, Telephone, Internet, Office Supplies, Postage, Courier Services, Utilities, Parking,

Landscaping, Property Taxes, Common Area Maintenance (CAM), and Janitorial Service.



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.



Expenses (includes any spouse, children, or non-production family members).



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.



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.



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



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



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



