

The 15-Minute QuickBooks Money Peace Checklist + Real-Time Cash Flow Dashboard Template



Work **F**aster **P**lay **L**onger

From a 25-year family business veteran who finally stopped guessing where the money went



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Most entrepreneurs start with a big dream: freedom, impact, more time with family, legacy.

But somewhere the dream turns into a trap — endless emails, invoices, troubleshooting, “got a minute?” interruptions. You’re plugging holes every day instead of building for the future. That’s why my company exists: My WHY: My company exists to liberate business owners from the daily grind so they can build generational wealth and actually enjoy their families while they are still young. That’s the foundation.

Everything in this Blueprint flows from it.



The 15-Minute Checklist

Step 1: Connect Your Bank (3 minutes)

Log into QuickBooks Online

Go to Banking → Connect Account

Link your business checking, savings, and credit cards

Step 2: Categorize everything. (Make your best guess, You can change it later.)

Step 3: Run Your First Real-Time Report (7 minutes)

Go to Reports → Profit & Loss

Set date range to “This Month”

Look at the bottom line and ask: “Am I actually profitable right now?”

Your Money Peace Score

How did that feel?

- Still guessing
- Starting to see clearly
- Total peace (I want this every month)



Real-Time Cash Flow Dashboard Template

QuickBooks Real-Time Cash Flow Snapshot

Date: _____

Cash in Bank: \$_____

Expected Inflows (next 30 days): \$_____

Expected Outflows (next 30 days): \$_____

True Cash Position: \$_____

Red Flag? (under 30 days of runway) Yes / No

Next Step



You now have a clear financial picture in under 15 minutes.

Ready to have this running perfectly every month without lifting a finger?

My team can set up your full QuickBooks system (bank rules, categories, alerts, and dashboard) in under 2 hours.

[\[Book Your 15-Minute Discovery Call\]](#)

Want live discussion and my personal reply?

Join the free Work Faster Play Longer Community here → [\[Facebook Group\]](#) and drop “Money Peace Magnet” in the comments. I reply to every new member this week.

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