

Am I Ready to Hire a Bookkeeper?

A self-assessment for construction companies and real estate investors who want accurate numbers and predictable cash flow.

YOUR CURRENT FINANCIAL SITUATION

- I am spending more than 3–5 hours per week on bookkeeping tasks instead of running my business.
 - My books are frequently behind — I don't know my real cash position without digging through bank statements.
 - I've mixed personal and business expenses, or I'm not sure if everything is properly categorized.
 - I dread tax season because my records are disorganized or incomplete.
 - I've missed invoicing a client, a vendor payment, or a bill deadline in the past 6 months.
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YOUR BUSINESS ACTIVITY

- I have consistent, recurring revenue — at least a few transactions per week.
 - I am managing multiple jobs, projects, or rental properties at the same time.
 - I have employees, subcontractors, or vendors I pay regularly.
 - I use job cost tracking, progress billing, or retainage — and I'm not confident my records reflect reality.
 - My business volume has grown to the point where a spreadsheet or basic software isn't keeping up.
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YOUR DECISION-MAKING AND VISIBILITY

- I can't quickly answer: "How much did I make on that last project?"
 - I rely on my bank balance — not a Profit & Loss statement — to decide whether I can take on new work.
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- I don't know which jobs or properties are profitable and which are breaking even (or losing money).
- I've had a lender, CPA, or bonding agent ask for financial statements I couldn't quickly produce.

YOUR READINESS TO WORK WITH A BOOKKEEPER

- I use — or am willing to use — cloud-based accounting software like QuickBooks Online.
- I can commit to providing receipts, bank statements, and documentation in a timely way each month.
- I understand that a bookkeeper records and organizes financial data — not a replacement for a CPA or tax preparer.
- I am willing to invest in professional bookkeeping as a business expense, not just a cost.

How to read your results

1–5 boxes checked: You may be in early stages. A bookkeeper can still help you build good habits from the start — the earlier you set up clean systems, the less cleanup you'll need later.

6–12 boxes checked: You're likely ready. Your volume and complexity are outpacing what you can manage alone, and the cost of disorganized books is growing.

13+ boxes checked: Don't wait. Every month without organized books is a month of financial blind spots — and likely money left on the table.

If you checked 6 or more boxes, it's worth having a conversation. Okie Accounting Group specializes in bookkeeping for construction companies and real estate investors — we build systems that give you real-time visibility, lender-ready financials, and predictable cash flow.

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