Bookkeepers work all year to track your money. When tax season hits, everything is already organized. That saves you time and helps you avoid mistakes that can cost money.

# Bookkeepers keep things organized every day. Accountants analyze the big picture to help you plan.

#### Bookkeeper vs. Accountant: Who Does What?

Both help your business stay healthy. They focus on different parts of your financial picture. Plus, both are important for a strong business.

Task	Bookkeeper	Accountant
Tracks daily income and expenses	▼ Yes	√ Sometimes
Matches bank and credit accounts	▼ Yes	<b>X</b> No
Helps manage payroll	▼ Yes	√ Sometimes
Creates monthly reports	▼ Yes	√ Sometimes
Reviews financial records for accuracy	✓ Yes	▼ Yes
Tax planning and filing	<b>X</b> No	▼ Yes
Advises on business growth and strategy	√ Sometimes	▼ Yes
Follows rules for IRS tax reporting	<b>X</b> No	Yes

# What Your Bookkeeper Does for Tax Season

Here are a few ways bookkeeping prepares you for tax season:

- Cleans up accounts and fixes errors.
- Tracks deductible expenses you can claim.
- Organizes digital receipts and documents.

- Prepares key reports for your CPA or tax pro.
- Helps your business avoid late filings and fees.

### How a Bookkeeper Prepares Records for Your Accountant

A bookkeeper is like the pit crew in a race, tuning everything behind the scenes so your accountant can speed ahead when it counts.

Your bookkeeper helps by:

- Reconciliations: Bank and credit card records match actual spending.
- Categorizing expenses: Makes tax deductions easier for your CPA.
- Finalizing payroll records: All wages, taxes, and benefits are correct.
- Preparing year-end financial statements: Profit and loss, balance sheet, A/R, and A/P reports.
- Organizing tax documents: 1099s, receipts, loan statements, mileage logs, and more.

When everything is neat, your accountant can quickly find ways to save you money.

### Year-End Strategies to Stay Ahead

Small habits equal significant relief at tax time. Your bookkeeper can guide you to:

- Review your numbers each month to identify problems early.
- Store receipts in one place, like a mobile app.
- Keep up with unpaid invoices.
- Talk with your tax pro before year-end if income changes.
- Plan for taxes with smart cash flow tracking.

#### Reduce Year-End Stress

Tax season doesn't have to feel stressful. With bookkeeping help for tax season and year-end, your numbers stay tidy, your reports are ready, and your accountant has everything needed to help you get the best results.

Schedule a conversation with us and finish the year strong.

# You Might Also Like

- 15 Holiday Season Financial Tips for Businesses
- 2025 Tax Checklist for Businesses and Individuals