Is It Time to Hire a Bookkeeper?

A 12-point self-assessment scorecard

Murray & Associates, LLC
Bookkeeping and Advisory Services

Score each statement 0–3 by how true it is for you right now: **0 = not at all** **1 = a little** **2 = mostly** **3 = absolutely**. Write your score in the box, total it at the bottom, and read where you land.

#	Statement	Score (0–3)
1	The books are weeks (or months) behind, and catching up keeps sliding.	
2	I can't answer “how much cash do I actually have to spend?” without digging.	
3	I do bookkeeping at night or on weekends because there's no other time.	
4	I'm not confident my P&L; and Balance Sheet are actually accurate.	
5	Invoices go out late, or I've lost track of who owes me money.	
6	Last tax season was a scramble of missing documents and surprises.	
7	I've made a decision on a gut feel because I didn't trust my numbers.	
8	My time is worth far more doing billable / revenue work than data entry.	
9	Transactions sit uncategorized or in “Ask My Accountant” for weeks.	
10	I've been hit with late fees, penalties, or bounced payments from disorganization.	
11	The business has grown — more accounts, employees, or complexity than a year ago.	
12	I dread opening my accounting software.	
	YOUR TOTAL SCORE (0–36)	

Where You Land

0 – 8	**You've got it handled — for now.** Your system is working. Keep a monthly routine and revisit if the business grows or your time gets tighter.
9 – 18	**Worth a serious look.** The cracks are showing. A part-time or monthly bookkeeper would buy back your time and de-risk tax season before it gets painful.
19 – 36	**It's time — probably overdue.** Bookkeeping is actively costing you money, time, and confidence. Bringing in a pro (bookkeeper, or a fractional controller if decisions are on the line) pays for itself quickly.

Not sure whether you need a bookkeeper, a controller, or a CPA? Grab the companion guide — *Bookkeeper vs. Controller vs. CPA* — to match the role to your need.