The $1M+ Wellness Business Financial Health Checklist

A quick self-assessment for chiropractic and wellness business owners who want a clearer read on where their finances actually stand.

CASH FLOW VISIBILITY

- [ ] I know my cash position today without logging into three different systems.
- [ ] I can predict next month's cash flow with reasonable confidence.
- [ ] I have a clear cash reserve target for slow seasons or surprises.
- [ ] Insurance or receivables timing doesn't regularly catch me off guard.

PROFITABILITY

- [ ] I know which services or revenue streams are actually most profitable.
- [ ] My profit margin this year is better than, or in line with, last year.
- [ ] I track profit monthly, not just at tax time.
- [ ] I understand the difference between being busy and being profitable.

OWNER COMPENSATION

- [ ] I pay myself a consistent, predictable amount.
- [ ] I could explain clearly what the business earns versus what I personally draw.
- [ ] My personal and business expenses are fully separated.

GROWTH & FUTURE READINESS

- [ ] I have a financial plan for hiring, opening a new location, or adding services.
- [ ] My books are clean enough to hand to a buyer or investor today.
- [ ] I have KPIs I check on a regular cadence, not just “gut feel.”

How to read your results:

12–14 checked — You have strong financial visibility. A fractional CFO can help you sharpen strategy and prepare for the next stage of growth.
7–11 checked — You're managing, but blind spots are likely costing you profit or peace of mind.
Under 7 checked — This is the most valuable time to bring in CFO-level support — small fixes now can prevent expensive problems later.

Want to walk through your results together? Book a free strategy call at calendly.com/hello-elevatedcfoadvisory/30min — no pressure, just clarity on what's working, what's not, and what to fix.

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