As Year-End Approaches, Have You Seen Recent Financials?



NOVEMBER 7, 2025 | BY: THE CLIENT ACCOUNTING SERVICES TEAM

Now is the time for businesses to review their financial position and make informed decisions for tax and financial optimization. Many companies are finalizing budgets, updating forecasts, and preparing documentation for lenders — making this a crucial period to ensure that financial statements are current, accurate, and clearly tell the story of their performance.

Our Client Accounting Services division works directly with business owners to provide accurate, timely, and lender-ready financial information. We help clients maintain consistent reporting throughout the year — giving both you and your clients confidence as you navigate year-end discussions and lending decisions.

Here are five key areas we help clients evaluate:

- **Budget vs. Actuals** – Spot deviations and understand the "why."
- **Cash Flow Trends** – Ensure liquidity and funding for growth.
- **Updated Forecasts** – Adjust course based on year-to-date results.
- **Debt & Financing** – Evaluate repayment, future needs, and reporting readiness.
- **Tax Planning** – Identify savings opportunities before year-end deadlines.

Taking a proactive approach now can help businesses avoid surprises, improve financial transparency, and strengthen their overall foundation for what's ahead — ensuring you, as their lending partner, can make confident, well-informed decisions.

As you and your clients approach year-end, having the right financial insight can make all the difference. Our team at Johnson O'Connor is here to help businesses strengthen their reporting, plan strategically, and position themselves for growth, ensuring you can move into the new year with clarity and confidence.

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