



DARLENA'S

Financial Services

BOOKKEEPING • NOTARY • PAYROLL • TAX

Organized Today. Empowered Tomorrow.

3RD QUARTER NEWSLETTER

JULY 2026



A NOTE FROM DARLENA

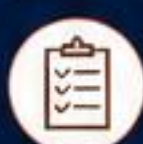
We're officially in the second half of 2026!

The first half flew by, and I hope your business is off to a great start.

Thank you for trusting me with your bookkeeping and for allowing me to be part of your business journey. My goal is to keep your finances organized, accurate, and stress-free so you can focus on what you do best.

Let's make this a successful Q3 and finish the year strong!

I appreciate you!



BUSINESS OWNER CHECKLIST

A few things you can do each month to keep your business running smoothly:

- ✓ Send bank and credit card statements by the 2nd or 3rd of each month
- ✓ Review your Profit & Loss
- ✓ Review your Balance Sheet
- ✓ Review outstanding invoices and customer payments
- ✓ Review your cash flow



WHAT'S NEW AT DFS



HAPPY 1 YEAR ANNIVERSARY, ANNA!

We're celebrating Anna's 1 year anniversary in July! Thank you for your hard work, dedication and the value you bring to our clients every day!



CONGRATULATIONS, ANNA!

Anna has earned her Intuit QuickBooks Online Certification – Level 1. We are so proud of your accomplishment!



NEW DBA – DARLENA'S FINANCIAL SERVICES

We are excited to announce our new DBA:

Darlena's Financial Services (DFS)
under Darlena's Bookkeeping & Fiduciary Services, LLC.



PARTNERED FOR YOUR SUCCESS

We've partnered with Hometown Tax to provide well-rounded services including tax preparation. Together, we help you stay organized, compliant and confident!



Let's Connect!



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Thank you to Henry Oliver,
Graphic Brand and Designer,
for my new logo and
business card design!
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WHY ORGANIZATION MATTERS



BETTER DECISIONS

Accurate financials give you the information you need to make smart business choices.



SAVE TIME & MONEY

Staying organized now saves hours of work (and money) later.



BE PREPARED

Be ready for tax time, loan applications and unexpected opportunities.



KNOW YOUR NUMBERS

Understanding your numbers puts you in control of your business's future.



A little organization today leads to bigger opportunities tomorrow.



DID YOU KNOW?



Businesses that review their financial statements monthly are more likely to:

- ✓ Increase profitability
- ✓ Improve cash flow
- ✓ Catch problems early
- ✓ Achieve long-term growth

*Knowledge is power—
let's keep you informed!*



FRIENDLY REMINDER

Please send bank and credit card statements by the 2nd or 3rd of each month so I can keep your books current and provide timely financial reports.

YOUR REVIEW MAKES A DIFFERENCE!



Positive reviews on my QuickBooks ProAdvisor profile help boost my ranking, build trust with new clients and support my small business.

It's one of the best compliments you can give!



Leave a review on my QuickBooks ProAdvisor page:

<https://proadvisor.intuit.com/app/accountant/search?searchId=darlana-marcon>

WHY WORK WITH DFS?



- ✓ Personalized service with a local touch
- ✓ Clear communication and reliable support
- ✓ Accurate, timely financials you can trust
- ✓ Partnerships that give you more value

I'm here to help your business thrive!



SERVICES I PROVIDE



Monthly Bookkeeping



Bookkeeping Cleanup



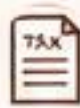
QuickBooks Setup



Payroll Services



Financial Reporting



Tax Preparation*



Fiduciary Services



Mobile Notary Services

*In partnership with Hometown Tax



Plan your work for today and every day, then work your plan."

— Margaret Thatcher



Thank you

for being a valued part of my business. I look forward to continuing to serve you in the months ahead!