

# TIME-SAVING TAX SAVING TECH TOOLS



## THE GOOD LIFE

By Merra Lee Moffitt, AWMA®, CMFC®, CFP®

In this month's article, I'll be sharing some of the tech tools that I have found that make my life easier and faster, so that I can spend my time making my business more profitable. These tools are easy to use, and often free or inexpensive.

**Dragon Naturally Speaking** — with Dragon you can talk and it will convert what you say to text. I'm using it right now to write this article. I used it several years ago, but was dissatisfied with the accuracy of the conversion; it seemed to make a lot of mistakes. But my typing is so bad and I need to make a lot of notes, so I thought I would try again. I'm happy to say Dragon has improved substantially, and I find I go to turn it on whenever I need to write anything that's more than a couple sentences.

**Mile IQ** — for anyone who needs to keep the mileage log for mileage reimbursement or tax deduction, this nifty little app is a go to. It connects with your GPS and senses that your car is moving and automatically tracks the mileage of each trip. Choose the type of mileage, whether it's business, personal, medical, charity or even make up your own category type. You can also add notes about what type of meeting and who you are meeting with to satisfy tax purposes.

**Evernote** — I, for one, abhor writing notes on little pieces of paper, because they nefariously get lost. I generally use a spiral notebook. Since sometimes I work out of my house, and other times in my office, and often make phone calls while driving (hands-free, of course), I needed something that would work on a laptop and an office workstation and iPhone and iPad. Evernote works great. I have lots of categories of notes from my gardening list,

house projects, people to call and many more. Oh, and by the way, it works with Dragon.

**Scanbot** — It's easy to scan in receipts with your cellphone using scanbot. No need to shove them in envelope or shoebox or wait till you are at your desk where there's a scanner.

**Hootsuite** — If you have more than one social media account, Hootsuite lets you schedule your posts in advance. It can schedule posts on Facebook, LinkedIn, Twitter, YouTube, Pinterest and several others. You can repost across several locations, planning your posts in advance. Although, admittedly my web gurus at Interlace Communications manage my postings, their use of Hootsuite on my social media sites helps them be efficient and cost effective. By the way, it's free if you are using three or less accounts.

I welcome your feedback; if you have nifty tools or apps that you use to make your business life easier, please let me know.

*Merra Lee Moffitt, AWMA, CMFC, CFP, a small business wealth strategist for Good Life Financial Group, spends all day, every day, guiding business owners, capturing their financial dreams and goals from their small business profits. Okay, a shameless plug. I help busy small business owners get results like these every day. We find the time; we get creative; we make profits happen. Call, click or contact me at 610.488.7353, [www.MerraLee.net](http://www.MerraLee.net) or [merralee.moffitt@lpl.com](mailto:merralee.moffitt@lpl.com).*

### Sixth Annual Meals on Wheels Fundraising Event featuring

## The Fabulous Greaseband®

Saturday, October 28, 2017



SunnyBrook Ballroom  
50 Sunnybrook Road, Pottstown

Buffet dinner at 6 p.m.  
(optional; advance dinner ticket required)  
Doors open at 7 p.m.  
Show begins at 8 p.m.

\$25 general admission (show only)  
\$60 buffet dinner and show

For tickets, call Meals on Wheels at  
610-326-1610 ext. 336 or visit [www.fsmontco.org/events](http://www.fsmontco.org/events).

# Business Planning Have You PUZZLED?



powered by  
good life

NURTURE YOUR  
FINANCIAL ROOTS!  
CALL MERRA LEE TODAY!

## Three "Interesting" Tactics for Financial Dynamics:

- 1) Let the additional income from new projects be used for 401k, Roth or retirement plans.
- 2) Use interesting ways to help slow paying customers.
- 3) Pay off the smallest debt first.



goodlife  
FINANCIAL GROUP  
**Merra Lee Moffitt**  
CMFC, AWMA, CFP®  
Senior Partner, Wealth Strategist

610-628-2055 • 610.488.7353 • fax 610.628.2055  
email [merralee.moffitt@lpl.com](mailto:merralee.moffitt@lpl.com) • [www.MerraLee.net](http://www.MerraLee.net)

Securities offered through LPL Financial, member FINRA/SIPC. Investment advice offered through Good Life Advisors LLC, a registered investment advisor. Good Life Advisors LLC and Good Life Financial Group are separate entities from LPL Financial.