



PREPARE FOR SETBACKS

Business continuity and future planning checklist

Start simple. You need clarity and one transferable system — not a complex legal pack today.

Direction

IF I LEAVE: CONTINUE / SELL / CLOSE / NEED ADVICE — AND WHO SHOULD KNOW FIRST

Knowledge that must leave your head

Write these down in your records over time (pricing, key customers, suppliers, how work is delivered, secure access notes).

FIRST DOCUMENT OR SYSTEM ANOTHER PERSON WOULD NEED

• NOTE

Estate planning and legal succession need qualified advice when you are ready.

This month

ONE THING TO
WRITE DOWN

WHO CAN HELP
