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**BUSINESS OWNERS**

# Business Owner Succession Checklist

Your business is likely your largest asset. Make sure it's connected to the rest of your plan.

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**InheritGuard Partners**

Coordination. Collaboration. Continuity.

[inheritguardpartners.com](https://inheritguardpartners.com)

### OWNERSHIP & AGREEMENTS

- Buy-sell agreement in place and funded
- Operating / shareholder agreements current
- Ownership and equity structure documented

### CONTINUITY PLANNING

- Key person identified and insured
- Successor identified and being developed
- Emergency / disability transition plan in place
- Management continuity documented

### VALUATION & FINANCES

- Current business valuation completed
- Tax implications of transfer modeled with CPA
- Funding mechanism for the transition secured

### ESTATE COORDINATION

- Business interest integrated into the estate plan
- Liquidity planned for estate taxes and equalization
- Attorney, CPA, and advisor aligned on the strategy

#### Next Step — Schedule a Private Review

Coordinate your business, tax, and estate decisions in one conversation. Visit [ericrodriguez.co/private-review](https://ericrodriguez.co/private-review).

*This checklist is provided for general educational purposes only and does not constitute legal, tax, or financial advice. InheritGuard Partners does not provide legal or tax advice. Consult qualified professionals about your specific situation.*