The Succession Starter Kit

The Checklist Every Business Owner Needs to Protect Their Legacy

Step 1: Choose Your Successor(s)

- Identify who could run your business if you couldn't.
- Actually ask if they want the role.

Step 2: Document the Essentials

- Write down key processes + systems.
- Store passwords, vendor contacts, financial accounts.

Step 3: Get Legal + Financials in Order

- Review will, power of attorney, buy-sell agreements.
- Check insurance coverage (life, disability, business continuation).

Step 4: Communicate Early

- Share intentions with family, partners, or team.
- Create a clear "what if" plan.

Step 5: Build Your Succession Dream Team

- Attorney, CPA, financial planner, coach.
- Make sure they collaborate.

Pro Tip: You don't need all the answers today — just take one step. Even small actions now protect your business, people, and legacy.

Ready to protect your legacy? Book a call with the PowHERhouse team today.

www.powherhousemoney.com @powherhousemoney Book a call here!