

Financial Planning Checklist for Business Owners

This checklist is designed to look at your financial picture so you can pursue your financial goals.

- Exit Strategy
- Estate
- Business Valuation
- Divorce
- Death

- Health
- Disability
- Critical Illness
- Life
- Liability

- Short-Term Goals
- Medium-Term Goals
- Long-Term Goals
- Retirement Goals



- Income
- Debt

- Corporate Structure
- Taxes Up-to-Date
- Tax Planning

- Health Benefits
- Retirement Benefits
- Executive Plans