

Business Continuity Checklist

Private educational business checklist

Use this checklist to organize continuity topics that may affect operations, ownership transition, and business resilience.

Best for: Documenting key people, financial obligations, succession concerns, buy-sell concepts, reserves, and critical systems.

Continuity review

Status	Step	Action
Not reviewed	1	Identify people essential to revenue and operations
Not reviewed	2	List business debt and personal guarantees
Not reviewed	3	Estimate operating-reserve needs during disruption
Not reviewed	4	Review ownership-transfer triggers and valuation method
Not reviewed	5	Coordinate buy-sell documents and funding concepts
Not reviewed	6	Identify operational and ownership successors
Not reviewed	7	Document critical systems, relationships, and credentials
Not reviewed	8	Coordinate legal, tax, accounting, valuation, and insurance professionals

Personal notes

Note 1: _____

Note 2: _____

Note 3: _____

Assumptions and limitations

- This checklist is educational only and does not replace legal, tax, valuation, or insurance review.
- Continuity planning details depend on ownership structure, contracts, and state law.
- Review this checklist with the business's qualified professional advisers before taking action.

Educational notice

General education only: This resource provides general educational information only. It is not individualized financial, insurance, investment, tax, legal, accounting, or credit advice and does not recommend a product, provider, account, policy, transaction, or strategy. Do not submit completed financial, insurance, medical, identification, or account records through a general HonorVale Group contact form.

Planning details should be coordinated with controlling documents and qualified advisers.

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