

As heard on:



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Building Better Futures



Estate Planning Checklist for Business Owners

Ensuring your business is protected – in life, and beyond.

Running a business comes with a unique set of responsibilities and risks. But what happens if you're temporarily unable to manage your business or if you pass away unexpectedly?

This checklist has been developed by Everalls Wealth Management to help you think through the most important estate planning considerations as a business owner. Whether it's ensuring continuity during incapacity or protecting your legacy for the future, we're here to help you take the next step with clarity and confidence.

Think of this document as a conversation starter—to help you consider the plans, documents and conversations that should be in place. Once completed, please reach out so we can discuss your next actions and connect you with the right legal, accounting, and financial advice.

We look forward to helping you secure your business and your legacy.

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Incapacity Planning

	Yes	No	Details
Do you have an Enduring Power of Attorney (EPOA) that includes business authority?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Does your EPOA understand the business operations and authority limits?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Have you created a Business Continuity Plan with key contacts and authority levels?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Are your login credentials, banking authority, and digital assets accessible to the right person?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Do you have a Partnership/Shareholder Agreement that outlines what happens if you're incapacitated?	<input type="checkbox"/>	<input type="checkbox"/>	_____

Death Planning

	Yes	No	Details
Do you have a valid and current Will that includes business ownership?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Does your Shareholder/Partnership Agreement outline what happens to your shares upon death?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Have you nominated who can buy your share, how it will be valued, and a timeline for sale?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Have you discussed your wishes with both family and business partners?	<input type="checkbox"/>	<input type="checkbox"/>	_____
Is your business structured to minimise tax and legal risks for your beneficiaries?	<input type="checkbox"/>	<input type="checkbox"/>	_____

Next Steps

	Yes	No	Details
Have you spoken with your accountant about the implications of your business structure?	<input type="checkbox"/>	<input type="checkbox"/>	
Have you consulted your lawyer to ensure your documents are complete and valid?	<input type="checkbox"/>	<input type="checkbox"/>	
Do you have a schedule to review your plan regularly?	<input type="checkbox"/>	<input type="checkbox"/>	

General comments

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