



BUSINESS SERVICES CHECKLIST

1. FINANCING AND BUILDING THE BUSINESS

- Business plan update
- Cash flow / cash needs planning
- Capital and legal structure
- Communications and branding strategy
- Collaborative marketing strategy
- Crowdfunding strategy

2. BUILDING SALES AND OPERATIONS

- Client relationship and sales management system
- Accounting system and integration with operations
- Managing human resources: employees and contractors
- Design and test internal controls
- Other software and systems integrations
- Collaborative social media strategy

3. SAVE MONEY BY CUTTING COSTS

- Accounting and payroll costs
- Insurance and workers compensation costs
- Tax free capital gains
- Income taxes

4. PROTECT WHAT YOU'VE EARNED

- Risk management strategy
- Management and ownership transition
- Trust fund liabilities
- Estate plan