



FIVE DOCUMENTS EVERY BUSINESS MUST HAVE

1. Job Description YES NO

Setting out what you do allows you to determine when to grow your business. If you have employees, job descriptions ensure that there isn't later confusion and help you classify the position for overtime considerations.

2. Standard Client Agreement YES NO

Litigation occurs when people are unclear what you are doing for them and what they are getting. To protect your business you need to manage these expectations from the beginning of the client relationship.

3. Confidentiality Agreement YES NO

Confidentiality Agreements prevent business sensitive information, even when that information isn't a Trade Secret, from falling into the wrong hands.

4. Company Policies and Procedures YES NO

An operations handbook allows your business to grow and your new employees find the information they need to complete a task without turning turn to you for every answer. Once you have employees you need certain critical employment policies to protect your business.

5. A Succession Plan. YES NO

Your business only has value if it survives you. This means creating a management team. You need planning and advice from many professionals to make the dream of selling your company and retiring a reality.

BONUS

6. Operating or Shareholders' Agreement/
Or Business Partner Agreements YES NO

**Customized and not "boilerplate" these documents protect your business' future.
Do you have them?**