



# Partnership Clarity & Boundaries Worksheet

## Purpose:

Use this worksheet to clarify roles, expectations, values, and financial agreements within your business partnership. Whether you're just starting out or want to strengthen an existing collaboration, this is your space to get aligned—with peace, love, and business sense.

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## Section 1: Foundation Check-In

**1. Why are we choosing to work together? What strengths does each person bring to the business?**

*Partner A:*

*Partner B:*

**2. What shared vision do we have for the business (3-5 years from now)?**

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**3. What are our core values as individuals and as a business?**

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## Section 2: Roles & Responsibilities

**4. Who is responsible for what? (List by function)**

- ✓ Marketing & Branding: \_\_\_\_\_
- ✓ Finances & Bookkeeping: \_\_\_\_\_
- ✓ Sales & Client Relations: \_\_\_\_\_
- ✓ Operations & Workflow: \_\_\_\_\_
- ✓ Leadership & Strategy: \_\_\_\_\_

**5. What happens if one partner is unavailable or steps back temporarily?**

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### **Section 3: The Money Talk**

**6. How will we divide profit or compensation?**

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**7. How will we handle expenses, reinvestment, and savings?**

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**8. What is our decision-making process for large financial decisions?**

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### **Section 4: Communication & Alignment**

**9. What is our rhythm for check-ins or meetings (weekly, monthly, quarterly)?**

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**10. How will we give each other feedback or address tension respectfully?**

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### **Section 5: Boundaries & What-Ifs**

**11. What personal boundaries do we need to respect in this partnership?**  
(e.g. time off, family priorities, communication hours)

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**12. If the partnership ever ends, how do we want to handle that process?**  
(E.g., exit agreements, buyout terms, client transitions)

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## ✓ Section 6: Final Alignment

Let's each answer this individually, then share:

**What do I need from my partner to feel supported and successful in this relationship?**

*Partner A:* \_\_\_\_\_

*Partner B:* \_\_\_\_\_

## ✍️ Partner Signatures (Optional)

By completing this worksheet together, we're committing to a partnership rooted in clarity, honesty, and mutual respect.

**Partner A:** \_\_\_\_\_

**Partner B:** \_\_\_\_\_

**Date:** \_\_\_\_\_