

Estate Plan for [Your Business Name]

I. List of LLC Businesses:

- A. [LLC Business 1]
- B. [LLC Business 2]
- C. [LLC Business 3] ...

Attach copies for each listed business: Business Registration Documents should include Certificate of Formation, EIN IRS-CP575 Notices, Assumed Name and Trade Name Registrations, Operating Agreement for each LLC, (Articles of Incorporation), (Franchise Tax Reports), all SOS filings, licenses, permits, insurance, bonds, all registrations and certifications, Tax Records, etc.

Including current and archived:

Business Plan

Elevator Pitch

Pitch Deck

Value Proposition

Financial Records:

- Accounting Records
- Financial Statements
- Profit & Loss Statements
- Bank statements to show deposits/ cash flow /cash reserves
- Filed Tax returns

Insurance Policies

II. Operating Agreement:

- Operating Agreement for [Your Business Name]
- Attach a copy of the Operating Agreement for each listed business

III. Succession Plan:

- Document outlining the succession plan for [Your Business Name]
- Attach a copy of the Succession Plan

IV. Business Personal Property:

- Itemized list of business personal property, including (attach item documentation such as receipts, serial numbers, VIN, paid invoices, bill of sales, appraisals, digital image file, etc):
 - Furniture and fixtures
 - Equipment and machinery
 - Vehicles
 - Inventory and stock
 - Other tangible assets owned by the business

V. Business Accounts:

- List of business bank accounts and their respective financial institutions
- List of investment accounts and their providers
- List of established tradelines in good standing

VI. Business Memberships and Subscriptions:

- List of business memberships and subscriptions, including:
 - Professional associations
 - Industry-specific memberships
 - Software subscriptions
 - Online services subscriptions

VII. Social Media Accounts:

- List of social media accounts used for [Your Business Name], including login credentials for each account

VIII. Intellectual Property (IP):

- Copyrights: List of copyrighted materials owned by the business, including registration details
- Trademarks: List of trademarks owned by the business, including registration details

IX. Trade Secrets, Customer Lists, Proprietary Documents:

- Document outlining trade secrets, customer lists, and proprietary documents owned by the business

X. Passwords:

- List of passwords and access codes for business-related accounts, government-related accounts, software, computer network, and online platforms

XI. Digital Assets:

- Digital assets associated with the business, including:
 - Business website and domain names
 - Online platforms and profiles
 - Email accounts
 - Online payment accounts
 - Business software and applications
 - Cloud storage accounts
 - Digital marketing assets (graphics, videos, etc.)
 - Other digital assets critical to the operation of the business

XII. Insurance Policies:

A. Business Liability Insurance:

- Provider: [Insurance Provider Name]

- Policy Number: [Policy Number]

B. Business Property Insurance:

- Provider: [Insurance Provider Name]

- Policy Number: [Policy Number]

C. Business Interruption Insurance:

- Provider: [Insurance Provider Name]
- Policy Number: [Policy Number]

D. Business Auto Insurance:

- Provider: [Insurance Provider Name]
- Policy Number: [Policy Number]

E. Business Life Insurance Policy:

- Provider: [Insurance Provider Name]
- Policy Number: [Policy Number]

XIII. Business Assets:

- List of business assets, including:
 - Real estate properties owned by the business
 - Intellectual property assets
 - Investment portfolios or holdings
 - Other valuable assets owned by the business

XIV. Other Businesses Owned:

- List of other businesses owned by [Your Business Name]

XV. Percentage of Ownership in Other Businesses:

- Percentage of ownership held by [Your Business Name] in each listed business

XVI. Asset Classes Owned by the Business:

- List of asset classes owned by the business, including:
 - Stocks
 - Bonds

- Mutual funds
- Real estate investments
- Other investment vehicles

XVII. Business Debts:

- Business Loans (including lender information, loan amounts, and terms)
- Outstanding Payables (creditors and amounts owed)

XVIII. Business Contracts and Agreements:

A. Customer Contracts:

- Customer Contract 1
- Customer Contract 2 ...

B. Supplier Contracts:

- Supplier Contract 1
- Supplier Contract 2 ...

C. Lease Agreements:

- Lease Agreement 1
- Lease Agreement 2 ...

D. Employment Agreements:

- Employment Agreement 1
- Employment Agreement 2 ...

XIX. Business Advisory Team:

A. Attorney:

- Attorney Name
- Contact Information

B. Accountant:

- Accountant Name
- Contact Information

C. Financial Advisor:

- Financial Advisor Name
- Contact Information

D. Insurance Agent:

- Insurance Agent Name
- Contact Information

E. Business Consultant:

- Consultant Name
- Contact Information

XX. Business Digital Assets and Online Accounts Login Credentials:

A. Business Website:

- Domain Name and Hosting Provider
- Login Credentials

B. Social Media Accounts:

- Facebook, Twitter, Instagram, LinkedIn, etc.
- Login Credentials

C. Email Accounts:

- Business Email Accounts
- Login Credentials

D. Online Payment Platforms:

- PayPal, Stripe, Square, etc.
- Login Credentials

E. Business Software and Applications:

- CRM Systems, Project Management Tools, etc.
- Login Credentials

XXI. Business Continuity Plan:

A. Emergency Contact List:

- Key Employees and their contact information
- IT Support Contact
- Insurance Agent Contact
- Legal Counsel Contact
- Suppliers Contact

B. Disaster Recovery Plan:

- Data Backup Procedures
- Offsite Data Storage Information

C. Key Business Processes and Critical Operations:

- Documented procedures for critical business activities

XXII. Attorney:

Name and contact information of the attorney representing the business

XXIII. Power of Attorney:

Document designating a trusted individual with power of attorney for business-related decisions in case of your absence or incapacity

XXIV. Executor/Personal Representative:

Designation of an executor or personal representative who will oversee the administration and distribution of your business assets according to your estate plan

XXV. Additional Parties:

Identification of any additional parties involved in the business, such as partners, co-owners, key employees, and investors.

XXVI. Beneficiaries:

Designation of beneficiaries who will inherit or receive benefits from the business in the event of your passing

XXVII. Additionally Insured:

Information regarding any individuals or entities named as additionally insured for the business's insurance policies

Remember to keep this estate plan updated and store it in a secure location. Additionally, inform the relevant parties mentioned in the plan about their roles and responsibilities to ensure a smooth transition and execution of your wishes.

Template to be filled in offline and stored as a back-up paper copy with Power of Attorney and Executor.