

Could Your Business Keep Running Without You?

The Solo Bookkeeper Emergency Backup Checklist

Use this quick checklist to see whether your practice is prepared to protect clients, deadlines, and critical work if an illness, injury, or unexpected emergency makes you unavailable.

1 CLIENT CONTINUITY

Checklist Item	Yes	No	Not Sure
Does someone know how to contact every client?	☐	☐	☐
Does someone know which clients have time-sensitive deadlines?	☐	☐	☐
Is there a process for notifying clients if you are unexpectedly unavailable?	☐	☐	☐
Does someone know which clients require immediate attention?	☐	☐	☐

2 CRITICAL WORK

Checklist Item	Yes	No	Not Sure
Are upcoming payroll deadlines documented?	☐	☐	☐
Are tax and filing deadlines documented?	☐	☐	☐
Are recurring bookkeeping tasks documented?	☐	☐	☐
Could someone determine what must be completed this week versus what can wait?	☐	☐	☐

3 ACCESS

Checklist Item	Yes	No	Not Sure
Is there a secure method for an authorized backup person to access necessary systems?	☐	☐	☐
Are software platforms and business accounts documented?	☐	☐	☐
Is there a secure process for accessing credentials without sharing passwords insecurely?	☐	☐	☐

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4 YOUR BACKUP PERSON

Checklist Item	Yes	No	Not Sure
Have you actually designated someone to step in?	☐	☐	☐
Does that person understand how your practice operates?	☐	☐	☐
Do they know what authority they have during an emergency?	☐	☐	☐
Are they prepared to communicate professionally with your clients?	☐	☐	☐
Could they step in today instead of trying to figure everything out during the emergency?	☐	☐	☐

5 YOUR READINESS CHECK

How many answers were “No” or “Not Sure”?

- 0–2 • Strong foundation — review your plan regularly.
- 3–5 • Important gaps exist — now is the time to address them.
- 6+ • Your clients and practice may be vulnerable if you suddenly cannot work.

If several of your answers were “No” or “Not Sure,” you may not have a complete backup plan yet.

Succession Security gives solo bookkeepers and accountants a trusted backup team that is in place before an emergency happens—helping protect client relationships and keep critical work moving when you cannot be there.

GIVE YOUR CLIENTS CONFIDENCE, TOO.

Succession Security members can display the Member Seal to show clients that they have taken the extra step of putting a trusted business backup solution in place.

READY TO PUT YOUR BACKUP PLAN IN PLACE?

Schedule Your Free Consultation

SuccessionSecurity.com

Succession Security • Trusted backup for the practice your clients depend on.