

Close Out

2025

with

Clarity



Here's a grounded year-end checklist for
coaches and heart-centered business owners

Virtually Debbie



October is the sweet spot.

You're far enough into the year to see what worked, and early enough to adjust before the holidays hit.

A thoughtful review now means less stress later and a cleaner and a more intentional start to 2026.

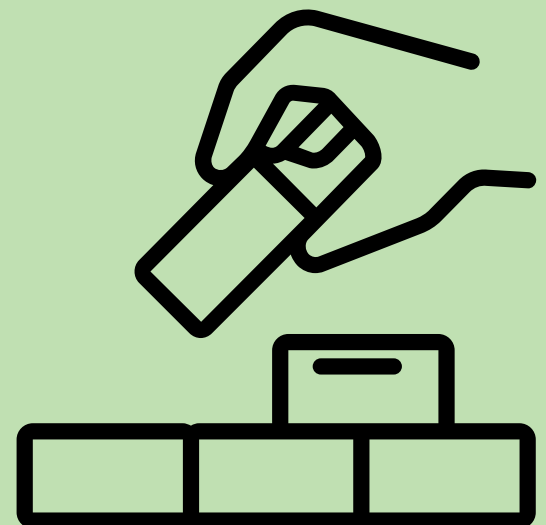
Let's make sure your business is aligned, sustainable, and ready to grow!



Audit the Foundation

Before you grow, strengthen what already exists.

- ▶ Confirm your business structure and licenses are current
- ▶ Review client agreements for clarity and alignment
- ▶ Ensure insurance coverage is active
- ▶ Simplify your backend, remove what no longer fits



Legal & Compliance

Stay legitimate and protect your credibility.

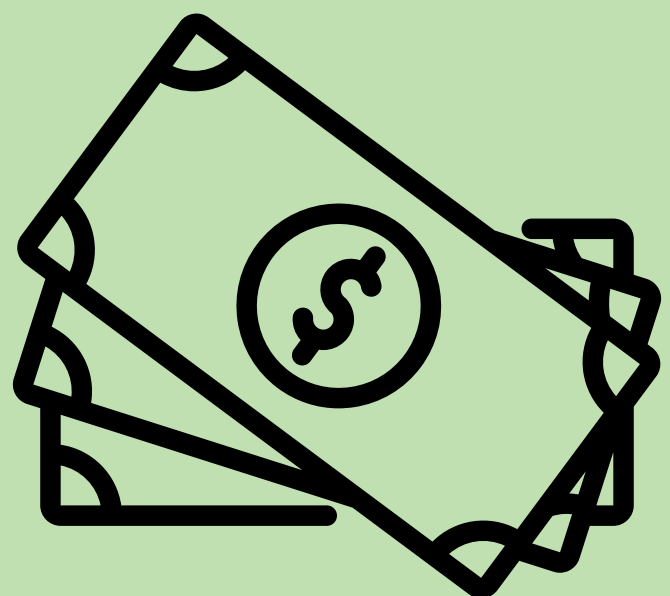
- ▶ Confirm your business registration or DBA is current
- ▶ Submit your annual report if you have an LLC
- ▶ Review website policies and privacy terms
- ▶ Ensure email tools meet deliverability + legal standards
- ▶ Renew your domain and confirm ownership



Review the Money

Numbers don't lie so listen to them.

- ▶ Reconcile income + expenses
- ▶ Identify what's actually profitable
- ▶ Set aside for taxes
- ▶ Revisit pricing through the lens of sustainability, not fear



Reflect on Your People

Your business is built on relationships, not metrics.

- ▶ Note which clients and projects felt aligned
- ▶ Send gratitude or closure messages
- ▶ Request testimonials where it feels authentic
- ▶ Clean up and securely store client files



Refine Your Presence

Visibility should feel real and not performative.

- ▶ Notice what marketing efforts actually connected
- ▶ Update your offers, website, and bio to reflect who you are now
- ▶ Archive outdated content
- ▶ Outline a simple Q1 visibility plan that feels sustainable



Review Your Offers

Your work evolves and your offers should too.

- ▶ Identify which services drained or lit you up
- ▶ Retire or repackage outdated ones
- ▶ Note patterns in what clients actually wanted
- ▶ Adjust messaging to reflect your current expertise



Simplify Your Systems

Every tool, subscription, and process should earn its keep.

- ▶ Cancel what you don't use
- ▶ Automate small, repetitive tasks
- ▶ Document your workflows for ease
- ▶ Back up essential data and passwords



Burnout check

Growth without bandwidth is burnout, so...

- ▶ Review how your schedule felt
- ▶ Identify your ideal workload
- ▶ Revisit boundaries with clients and peers
- ▶ Consider what support you need next year (VA, bookkeeper, coach)



Invest in YOU!

You are the asset so protect and develop it.

- ▶ Reflect on what you learned and what you're done learning
- ▶ Choose 1–2 areas for growth next year
- ▶ Budget for mentorship or continuing education
- ▶ Build in accountability that feels like support, not pressure



**Close the year with
intention, not exhaustion.**

Save this checklist.



Pour some tea.



Give yourself the grace to review
your year with honesty and clarity.

Virtually Debbie

