

Before You Sell, Retire, or Hand Off the Business, Document the Digital Estate

A readiness guide for owner succession, business sale, management handoff, and continuity planning.

Checklist Items to Address

Use this as a conversation starter with owners, successors, advisors, and trusted technical partners.

Ownership Trail

- ✓ Domains, websites, and cloud accounts
- ✓ Admin owner names and recovery paths
- ✓ Transfer notes and authority limits

Buyer or Successor Readiness

- ✓ Account inventory and renewal dates
- ✓ Vendor contacts and contract terms
- ✓ Recurring charges and licenses

Security Cleanup

- ✓ Remove unused admin access
- ✓ Review trusted recovery devices
- ✓ Separate personal and business accounts

Continuity Package

- ✓ Preserve, transfer, or close decisions
- ✓ Emergency contacts and escalation path
- ✓ Annual review and update rhythm

Next Step

Turn the digital side of the business into something a successor can understand, maintain, and protect.