

Protecting You and Your Business

How is your company structured?

Sole Proprietor

Partnership

Corporation

Do you have the necessary insurance?

Liability

Home Based Business

Cyber

Vehicle

Property

Where are your policies?

Are your business finances separate?

Yes

No

Bank Account

Credit Card

Savings for GST

Savings for Taxes

Stabilization

Where is your banking?

Operating Account

Credit Card

Savings GST

Savings Taxes

Stabilization

Do you have a Buy / Sell Agreement?

Yes

No

Does it cover

Death

Disability

Critical Illness

Leave on Good Terms

Leave on Bad Terms

Do you have insurance to fund it?

Yes

No

Where are your documents?

Are you using Data Best Practices?

Yes

No

Malware

AntiVirus

Firewalls

Backups

Cloud

Separate Hard Drive

USB

Do you have written policies for dealing with complaints / legal / government?

Yes

No

Where are they?

Have you protected your personal assets?

Segregated Funds

Home Based Business Insurance

Liability Insurance