

Trucking owner checklist

Advisor share kit

The SellMyTruckingCompany checklist helps trucking owners organize the business behind the fleet before discussing a possible sale or handover. It is useful even before an owner has chosen a sale date.

Who it serves

Designed for trucking-company owners considering their next chapter, with particular relevance to businesses with \$5M–\$100M annual revenue and \$1M+ EBITDA in Texas, Ohio, Illinois, Pennsylvania and Michigan. These are audience guidelines, not acceptance criteria or a valuation.

Four starting points

1. Build a complete equipment and obligations schedule.
2. Organize financial results and customer contracts.
3. Document driver, dispatch and owner responsibilities.
4. Write down your timing and preferred handover role.

Discussion prompts

Goals and timing — What would you like to change about your role, and what would a good handover look like?

Fleet and obligations — Which assets are owned, financed or leased, and what maintenance or replacement needs are approaching?

Earnings and customers — How do dedicated, contracted and spot loads contribute to results, and where is customer concentration?

People and continuity — Who handles dispatch, drivers and customer relationships when you are away?

Professional review — Which financial, tax, legal, contract or operating-authority questions need specialist review before you choose a transaction structure?

A concise introduction to share

If you are thinking about stepping back from your trucking company, this checklist is a useful starting point. It covers equipment, financials, customer relationships and the handover. Use it for your own planning, then bring your questions to our next conversation.

<https://sellmytruckingcompany.com/#prepare>

Preparation guidance only. Not a valuation, legal or tax advice, a promise of a buyer, or a decision on eligibility. Checklist controls do not submit an inquiry; the homepage has a separate contact form. Keep confidential records out of public messages and use your advisor's agreed secure channel. Ordinary website hosting still applies.