



## BUSINESS STARTUP CHECKLIST

Please bring the following documents.

### **Business Concept & Structure**

- Proposed/alternate names
- Desired structure
- Business purpose/description
- Products/services
- Ownership & management

### **Registration & Legal Requirements**

- Check name availability
- Register business (articles)
- Obtain federal EIN
- Obtain state tax ID
- Licenses/permits
- Register sales tax

### **Banking & Financial Setup**

- Open bank account
- Set up accounting/bookkeeping
- Determine accounting method
- Set up payroll
- Establish financial policies

### **Compliance & Insurance**

- Register unemployment/workers' comp
- Obtain liability insurance
- Recordkeeping & retention
- Determine tax obligations
- Labor law compliance

### **Optional Operational Setup**

- Business plan
- Bylaws/operating agreement



- Trademarks/IP
- Marketing & website
- Contracts/agreements/client forms

**Additional Notes**

- Regulated industries licensing
- Multi-state operations
- Compliance timeline
- Ongoing support (bookkeeping, filings, payroll)