

## Business Start-Up Checklist

The following checklist is not meant to be all-inclusive but rather a roadmap on some considerations for the beginning of your business. Not all items are applicable to all business and it is not meant to be strictly chronological as timing variances occur amongst different jurisdictions and types of business.

### Research and Development

- Research business idea and market
- Write a business/marketing plan
- Determine funding sources (debt/equity/alternative)
- Determine physical location of business
- Check local zoning laws
- Investigate business start-up courses and seminars (SBA, SCORE, etc.)
- Find a mentor
- Determine professional team (attorney, accountant, insurance, etc.)

### Business Name and Structure

### Date completed

- |   |                |
|---|----------------|
| • Determine name of business                          | ____/____/____ |
| • Select a business structure                         | ____/____/____ |
| • File Corporate/LLC/Partnership documents with State | ____/____/____ |

### Taxes/Licenses/Permits

### Date completed

- |  |                |
|--|----------------|
| • Obtain Employer Identification Number (EIN) from IRS | ____/____/____ |
| • Obtain state sales tax identification number         | ____/____/____ |
| • Obtain state business identification number          | ____/____/____ |
| • Obtain any required licenses (to do business)        | ____/____/____ |
| • Obtain any required permits (to do business)         | ____/____/____ |

### Banking

### Date completed

- |  |                |
|--|----------------|
| • Open business bank account                         | ____/____/____ |
| • Order business checks                              | ____/____/____ |
| • Set up any business credit/debit card accounts     | ____/____/____ |
| • Establish credit/debit card processing             | ____/____/____ |
| • Establish online payment accounts (such as PayPal) | ____/____/____ |

**Accounting and Taxes****Date completed**

- Set up accounting books and records \_ / \_ / \_
- Prepare initial sales estimates/forecasts \_ / \_ / \_
- Prepare initial cash flow estimates \_ / \_ / \_
- Create initial operating budget \_ / \_ / \_
- Create initial balance sheet \_ / \_ / \_

**Owners/Officers/Directors/Managers****Date completed**

- Hold initial meeting for owners \_ / \_ / \_
- Select officers/directors/managers \_ / \_ / \_
- Approve bylaws/operating agreements for business \_ / \_ / \_
- Approve initial resolutions \_ / \_ / \_

**Internet/Social Media Presence****Date completed**

- Register business domain name for website \_ / \_ / \_
- Establish business e-mail addresses \_ / \_ / \_
- Establish social media presence (LinkedIn, Twitter, Facebook, etc.) \_ / \_ / \_
- Register any applicable trademarks \_ / \_ / \_
- Register any applicable copyrights for business \_ / \_ / \_
- Develop logo/branding for business \_ / \_ / \_
- Develop initial website \_ / \_ / \_

**Utility Services****Date completed**

- Obtain telephone number for business \_ / \_ / \_
- Order internet/cable/tech services \_ / \_ / \_
- Order other utility services: \_\_\_\_\_ \_ / \_ / \_

**Insurance****Date completed**

- Obtain general business insurance \_ / \_ / \_
- Obtain property/casualty insurance \_ / \_ / \_
- Obtain health insurance \_ / \_ / \_
- Obtain workers compensation insurance (if any employees) \_ / \_ / \_
- Obtain unemployment insurance (if any employees) \_ / \_ / \_
- Obtain other insurance: \_\_\_\_\_ \_ / \_ / \_

**Employees**

**Date completed**

- Register business with State Department of Labor \_ / \_ / \_
- Obtain Form W-4 and I-9 from all employees
- Obtain a copy of each employee’s Social Security card (if available)
- Register employees with State Department of Labor (if applicable) \_ / \_ / \_
- Maintain an employee file for each employee
- Develop employee manual/handbook \_ / \_ / \_
- Develop workplace safety measures (OSHA requirements) \_ / \_ / \_
- Set up employee benefits:
  - Retirement plans \_ / \_ / \_
  - Health insurance \_ / \_ / \_
  - Life insurance \_ / \_ / \_
  - Other: \_\_\_\_\_ \_ / \_ / \_
- Set up payroll accounting system \_ / \_ / \_
- Set up Federal and State employment tax deposit requirements \_ / \_ / \_
- Obtain copy of IRS Publication 15, Circular E (at [www.irs.gov](http://www.irs.gov))

**Miscellaneous**

**Date completed**

- Order business cards \_ / \_ / \_
- Order initial inventory \_ / \_ / \_
- Purchase office equipment, furniture, supplies, etc. \_ / \_ / \_
- Prepare initial advertising/marketing \_ / \_ / \_
- Send out publicity releases \_ / \_ / \_
- Secure all information/IT/back-up \_ / \_ / \_
  
- Other: \_\_\_\_\_ \_ / \_ / \_
- \_\_\_\_\_ \_ / \_ / \_
- \_\_\_\_\_ \_ / \_ / \_
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