

AVOID ROOKIE MISTAKES

The Ultimate Business Startup Checklist

- ☒ Business idea
- ☒ Market research
- ☒ Business plan
- ☒ Legal structure
- ☒ Business name
- ☒ Registrations & permits
- ☒ Business bank account
- ☒ Accounting setup
- ☒ Funding
- ☒ Marketing

FREE EXPERT GUIDE

Avoid rookie mistakes. Fix hidden gaps. Build smarter.

Whether you're just starting or scaling up, this checklist helps you dodge costly errors and launch with strategy. If you're unsure about anything below, **book a free consultation**—we're here to get you right.

1. 📋 Registered the Business?

- ☐ Did you choose the right entity for tax and liability purposes (LLC, S-Corp, Nonprofit)?
- ☐ Is your business name legally registered and unique?
- ☐ Did you check for conflicts with domain/social handles?

Mistake: Many business owners skip this and get stuck rebranding later.

2. 🔑 EIN and Business Bank Account

- ☐ Do you have an EIN from the IRS—not your SSN?
- ☐ Is your business bank account set up in your company's legal name?

Mistake: Mixing personal and business funds causes issues at tax time and ruins credibility.

3. 📁 Business Licenses + Compliance

- ☐ Do you have all local/state/federal licenses for your industry?
- ☐ Are you keeping up with BOI filings and annual reports?

Common error: Assuming your LLC filing is the only requirement. It's not.

👉 Need help? Let's talk.

4. 🏦 Business Credit Foundation

- ☐ Do you have at least 2–4 Net-30 vendors reporting to credit bureaus?
- ☐ Have you checked your DUNS number and business credit score?

Mistake: Relying only on personal credit or skipping this step entirely.

From the Experts at **Paid in Full Financial** | www.paidinfullfinancial.com | 954-580-3882

5. 🧩 Digital Presence = Trust

- ☐ Does your business have a branded email (not @gmail)?
- ☐ Is your business listed online (Google, Yelp, Bing)?
- ☐ Do your listings match your LLC and EIN info exactly?

Mistake: Inconsistent or missing listings hurt funding and SEO.

6. 📊 Bookkeeping & Financial Tracking

- ☐ Are you tracking income and expenses monthly—not just at tax time?
- ☐ Do you have a separate business bookkeeping system (like QuickBooks)?

Seasoned owner slip: Outsourcing taxes but not keeping records in real time.

👉 Ask us about our bookkeeping plans.

7. 📈 Growth & Funding Strategy

- ☐ Have you created a business plan or financial forecast (even a simple one)?
- ☐ Do you know what lenders look for (revenue, credit, time in biz)?
- ☐ Are you prepped to apply for loans, credit lines, or grants?

Growth-killer: Having goals but no numbers.

👉 Let's build a plan that gets you funded.

8. 📣 Marketing & Customer Journey

- ☐ Do you have a simple system to attract leads (IG, website, email capture)?
- ☐ Can customers clearly understand your offer in less than 10 seconds?
- ☐ Are you collecting testimonials and reviews?

Mistake: Skipping brand trust building until it's too late.

9. 👥 Team & Systems

- ☐ Are roles and responsibilities clearly defined—even if it's just you?
- ☐ Do you have repeatable processes for onboarding, sales, or support?

Pro-level upgrade: Automate the repetitive stuff so you can grow.

10. 🧠 Mindset, Strategy & Support

- ☐ Do you revisit your goals quarterly?
- ☐ Do you have a trusted advisor, coach, or consultant you can call?

The smartest owners don't do it alone—neither should you.

👉 *Schedule a free consult today and let's map out your next move.*