

New Company Setup Checklist

COMPANY INFORMATION	
Company name:	
Address:	
Telephone number:	
Email address:	
Date business started:	
Number of owners:	

CHECKLIST	
<input type="checkbox"/>	Choose type of business entity. Business entity type: [Sole Proprietorship/LLC/Corporation]
<input type="checkbox"/>	Select end of fiscal year. Fiscal year-end: December 31
<input type="checkbox"/>	Apply for IRS Employer Identification Number (EIN), if applicable. SS-4 and F2553 acceptance letter
<input type="checkbox"/>	Register with state as a business.
<input type="checkbox"/>	Obtain county and city business licenses.
<input type="checkbox"/>	If corporation, file letters of incorporation, operating agreement If partnership, create and sign partnership agreement. If LLC, file letters of organization, provide operating agreement
<input type="checkbox"/>	Purchase insurance plan(s).
<input type="checkbox"/>	Create company Web site. Web site address:
<input type="checkbox"/>	Choose an accounting method: [Cash/Accrual]
<input type="checkbox"/>	Select and purchase accounting software.
<input type="checkbox"/>	Install and set up accounting software.
<input type="checkbox"/>	Open a business banking account.
<input type="checkbox"/>	Obtain a business credit card.
<input type="checkbox"/>	Consider contracting with payroll processing firm and/or record-keeping firm.
<input type="checkbox"/>	Establish a salary agreement for each owner.
<input type="checkbox"/>	Establish a retirement plan.