BUSINESS STARTUP CHECKLIST

What New Business Owners May Need

Use this checklist to organize the key information, registrations, financial setup, and operating basics commonly needed when starting a business.

Business/Owner Name _____	**Business Name** _____	**Target Start Date** _____
Phone _____	**Email** _____	**Industry** _____

1. Business Basics

Clarify the core information that will shape your startup records and registrations.

- ☐ Confirm your proposed business name.
- ☐ Define the primary business activity or purpose.
- ☐ Identify all owners and ownership percentages.
- ☐ Confirm the principal business and mailing addresses.
- ☐ Set up a dedicated business phone number and professional email.
- ☐ Secure a domain name and basic online presence, if applicable.

2. Formation & Registration

Complete the registrations and identification steps applicable to your business.

- ☐ Select an appropriate business structure after considering legal and tax implications.
- ☐ Check business-name availability and register a fictitious/DBA name if needed.
- ☐ Prepare and submit applicable state formation documents.
- ☐ Obtain an Employer Identification Number (EIN), if applicable.
- ☐ Identify state and local registrations, licenses, permits, or business tax receipts.
- ☐ Create or obtain applicable organizational documents, such as an operating agreement, bylaws, or partnership agreement.

3. Financial & Tax Setup

Separate business finances early and prepare for tax and recordkeeping obligations.

- ☐ Open a dedicated business bank account.

- ☐ Choose a bookkeeping or accounting system.
- ☐ Create a chart of accounts and recordkeeping process.
- ☐ Establish a startup budget and track owner contributions or loans.
- ☐ Determine applicable federal, state, and local tax registrations.
- ☐ Evaluate estimated-tax, sales-tax, payroll-tax, or other filing requirements.
- ☐ Create a tax and filing calendar for recurring deadlines.

Build the Business Beyond Formation

4. Operations & Compliance

Put the systems, protections, and recurring responsibilities in place to support day-to-day operations.

- ☐ Identify required business insurance coverage.
- ☐ Set up invoicing, payment processing, and expense-management procedures.
- ☐ Organize contracts, vendor files, and customer records.
- ☐ Establish payroll and worker-classification processes if hiring employees or contractors.
- ☐ Create a compliance calendar for annual reports, licenses, renewals, and tax filings.
- ☐ Set up secure storage and backup procedures for business and client records.

5. Brand, Technology & Customer Setup

Create the basic tools customers will use to recognize, contact, and do business with you.

- ☐ Finalize your business name, logo, and brand basics.
- ☐ Create a professional website or landing page, if needed.
- ☐ Set up professional email accounts and business contact information.
- ☐ Create or claim relevant online business profiles.
- ☐ Select essential software for scheduling, accounting, customer management, or operations.
- ☐ Use strong passwords, multi-factor authentication, and secure access practices.

6. Planning for Growth

Define what success looks like and prepare the business for future decisions.

- ☐ Write a simple business plan or strategic roadmap.
- ☐ Set revenue, expense, and cash-flow goals.
- ☐ Identify key performance indicators (KPIs) to monitor.

- ☐ Estimate funding or working-capital needs.
- ☐ Document near-term priorities for the first 30, 60, and 90 days.
- ☐ Schedule periodic reviews of finances, operations, tax readiness, and compliance.

Documents to Bring to Your Premier Alliance Consultation

Having these items available can help us better understand your startup needs.

- ☐ Government-issued identification for applicable owners.
- ☐ Proposed business names and ownership information.
- ☐ Existing formation or registration documents, if any.
- ☐ Business address and contact information.
- ☐ Brief description of products or services to be offered.
- ☐ Any current licenses, contracts, business plans, budgets, or financial records.

Ready to Get Started?

Bring this completed checklist to your consultation. Premier Alliance can help you identify the formation, financial, tax, licensing, and operational steps that may apply to your business.

Non-attorney document preparation services; no legal advice, counsel, or representation provided.

Requirements vary by business, industry, location, and structure. This checklist is general information and is not a substitute for legal, tax, or other licensed professional advice.