

New Company Setup Checklist

COMPANY INFORMATION	
Company name:	
Address:	
Telephone number:	
Fax number:	
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"/>	Obtain Fictitious Name	Administered by your County Clerk or Secretary of State
<input type="checkbox"/>	Apply for IRS Employer Identification Number (EIN), if applicable.	To obtain Form SS-4 to apply for an EIN, go to irs.gov
<input type="checkbox"/>	Open Business Bank Account	
<input type="checkbox"/>	Obtain county and city business licenses.	
<input type="checkbox"/>	Obtain a business credit card.	
<input type="checkbox"/>	If corporation, file letters of incorporation. If partnership, create and sign partnership 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"/>	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.	