|  |  |
| --- | --- |
| [Company Name] | your logo here |

# New Company Setup Checklist

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| COMPANY INFORMATION |
| Company name:  |  |
| Address:  |  |
| Telephone number:  |  |
| Fax number:  |  |
| Date business started:  |  |
| Number of owners:  |  |

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| --- |
| CHECKLIST |
| [ ]  | Choose type of business entity.Business entity type: [Sole Proprietorship/LLC/Corporation] |  |
| [ ]  | Select end of fiscal year.Fiscal year-end: December 31 |  |
| [ ]  | Apply for IRS Employer Identification Number (EIN), if applicable. | To obtain Form SS-4 to apply for an EIN, go to irs.gov |
| [ ]  | Register with state as a business. | [Licensing contact information] |
| [ ]  | Obtain county and city business licenses. | [Licensing contact information] |
| [ ]  | If corporation, file letters of incorporation.If partnership, create and sign partnership agreement. | [Attorney contact information] |
| [ ]  | Purchase insurance plan(s). | [Insurance agency contact info] |
| [ ]  | Create company Web site. Web site address: |  |
| [ ]  | Choose an accounting method: [Cash/Accrual] |  |
| [ ]  | Select and purchase accounting software. | [Software recommendations] |
| [ ]  | Install and set up accounting software. |  |
| [ ]  | Open a business banking account. |  |
| [ ]  | Obtain a business credit card. |  |
| [ ]  | Consider contracting with payroll processing firm and/or record-keeping firm. | [Payroll service information] |
| [ ]  | Establish a salary agreement for each owner. |  |
| [ ]  | Establish a retirement plan. |  |