



New Company Setup Checklist

CONTACT:

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COMPANY INFORMATION	
Company name:	
Address:	
Telephone number:	
Date business started:	
Names of Owners:	
Brief Description	

CHECKLIST	NOTES
<input type="checkbox"/> Your first step is to complete a draft of your company’s business plan to outline your business model, to articulate your marketing and management plan, to conduct market research on your industry, to identify your short and long term company goals, and to determine the amount of financing needed to start your business (contact Aaron Sams for assistance):	
<input type="checkbox"/> Choose Business Name and Organizational Structure (i.e. Sole Prop, Partnership, LLC, Corporation):	
<input type="checkbox"/> Obtain EIN/Tax ID Number:	
<input type="checkbox"/> Establish Business Bank Account & Apply for Financing (consider an SBA Approved Lender):	
<input type="checkbox"/> Establish A Relationship With A Lawyer That Practices Corporate Law (In Anticipation of Future Legal Needs):	

<input type="checkbox"/>	Establish Marketing Materials – Purchase Domain Name, Establish Company Email Accounts, Develop Website, Brochures, Flyers, Business Cards, Embroidered Shirts/Items, etc.	
<input type="checkbox"/>	Establish Internal Bookkeeping Processes and Software or Hire a Bookkeeping Firm To Track Revenue/Expenses:	
<input type="checkbox"/>	Establish Internal HR Processes (Employee Handbook, Payroll Administration, Job Descriptions/Proposed Wage Scales, Employment Applications, etc., or Hire a HR Consulting Firm To Handle These Functions.	
<input type="checkbox"/>	Secure Commercial Real Estate and Complete Interior & Exterior Finish Out/Remodeling (If Needed):	
<input type="checkbox"/>	Recruit and Hire Employees As Needed:	
<input type="checkbox"/>	Purchase and Obtain General Liability Insurance and Other Insurance Coverage As Needed:	
<input type="checkbox"/>	Join a Chamber of Commerce, Trade Organization, or Networking Association to Promote Your Company:	
<input type="checkbox"/>	Market/Promote/Advertise Your Business For At Least Two-Three Weeks Before Grand Opening:	
<input type="checkbox"/>	Open For Business!	