NEW BUSINESS OWNER CHECKLIST

A guide to help you launch with confidence.

BUSINESS FOUNDATIONS

- [ ] Choose your business structure
- [ ] Register your business name
- [ ] Apply for your EIN
- [ ] Secure licenses & permits
- [ ] Open your business bank account

FINANCIAL SETUP

- [ ] Select bookkeeping software
- [ ] Build your chart of accounts
- [ ] Create monthly financial workflow
- [ ] Organize digital storage
- [ ] Plan your startup budget

TAX & COMPLIANCE

- [ ] Learn your tax obligations
- [ ] Register for sales tax
- [ ] Identify deductible expenses
- [ ] Set up estimated payments
- [ ] Review payroll compliance

BUSINESS OPERATIONS

- [ ] Write your SOPs
- [ ] Set up invoicing
- [ ] Build onboarding workflows
- [ ] Choose insurance
- [ ] Create a backup plan

BRANDING & MARKETING

- [ ] Define your brand identity
- [ ] Build your website
- [ ] Claim Google Business Profile
- [ ] Set up social media
- [ ] Create a marketing plan

PAYROLL & HIRING

- [ ] Register for payroll withholding
- [ ] Set up payroll software
- [ ] Collect onboarding documents
- [ ] Review labor laws
- [ ] Create an employee handbook

ONGOING MANAGEMENT

- [ ] Monthly financial reviews
- [ ] Track KPIs
- [ ] Reconcile accounts
- [ ] Review insurance
- [ ] Prepare for year-end taxes

MAS

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