
New Business Startup Checklist

Mark items that apply to your situation.

- ☐ Define your services, customers, startup budget and funding plan.
- ☐ Review legal structure and tax treatment with qualified professionals.
- ☐ Check name availability; complete required entity or business name registrations.
- ☐ Apply for an EIN when required; organize formation and ownership documents.
- ☐ Verify city, county, state and industry licenses, permits and zoning before operating.
- ☐ Review sales tax registration, employer accounts and tax obligations where applicable.
- ☐ Open a separate business bank account and choose bookkeeping and payment systems.
- ☐ Arrange appropriate insurance; prepare contracts, pricing and record storage.
- ☐ Before hiring, review worker classification, payroll setup and employment requirements.
- ☐ Create a compliance calendar and verify current requirements with the appropriate agencies.

General information only. Not individualized tax or legal advice. Requirements vary; not every item applies. Use a secure method to share sensitive records.

Official reference: <https://www.sos.ca.gov/business-programs/business-entities/starting-business>

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