

Small Business Startup Checklist

A simple planning checklist to help organize the first steps of a new business.

Business idea & name

- ☐ Define what you sell and who you serve
- ☐ Choose a clear business name
- ☐ Check state/entity name availability
- ☐ Check domain and social name availability

Business setup

- ☐ Choose a business structure
- ☐ File state formation documents if applicable
- ☐ Get an EIN when appropriate
- ☐ Review local licenses and permits
- ☐ Open a business bank account

Notes for business setup

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Page 2 - money, operations, and next steps.

Money & bookkeeping

- ☐ Choose a bookkeeping system
- ☐ Separate business and personal spending
- ☐ Create an invoice and payment process
- ☐ Track startup costs
- ☐ Set a monthly bookkeeping routine

Operations & growth

- ☐ Set customer terms and policies
- ☐ Create basic contracts/forms as appropriate
- ☐ Set up business email and website
- ☐ Create a simple marketing plan
- ☐ Review insurance needs

Top 3 priorities for the next 30 days