

Business Licenses and Permits Checklist for Small Businesses

How to Use This Checklist

This Business Licenses and Permits Checklist helps business owners identify licensing, permit, tax registration, zoning, and inspection requirements before opening.

Because requirements vary by industry, business activity, and location, always verify information through official federal, state, county, and local government sources. This checklist is a generalized listing of the most common business steps and requirements for registration.

Business Information

BUSINESS NAME
OWNER/PRIMARY CONTACT
BUSINESS ADDRESS
TARGET OPENING DATE
PERSON RESPONSIBLE FOR LICENSING
LAST REVIEW DATE

Step 1: Define the Business

- ☐ Before researching licenses and permits, clearly define what the business will do.

Business Activities

- ☐ Products sold
- ☐ Services provided
- ☐ Industry, trade, or profession identified
- ☐ Cities, counties, and states where business will operate identified

Operating Model

- ☐ Commercial location
- ☐ Home-based business
- ☐ Online business
- ☐ Mobile business
- ☐ Temporary or event-based business
- ☐ Multiple locations



Operational Factors

- ☐ Customers visit the location
- ☐ Employees will be hired
- ☐ Taxable products or services sold
- ☐ Licensed work performed
- ☐ Food preparation or sales
- ☐ Alcohol sales or service
- ☐ Regulated products, equipment, vehicles, chemicals, or materials used
- ☐ Planned construction, remodeling, signage, seating, entertainment, delivery, events, or mobile operations
- ☐ Target opening date established

Step 2: Confirm Core Business Records

- ☐ Business entity formed or registered
- ☐ DBA/trade name registered
- ☐ EIN obtained from the IRS
- ☐ Multistate registration requirements reviewed
- ☐ Business bank account opened
- ☐ Compliance folder created for:
 - ☐ Licenses
 - ☐ Permits
 - ☐ Applications
 - ☐ Inspection reports
 - ☐ Agency communications
 - ☐ Receipts
- ☐ Business name and ownership information are consistent across all documents

Step 3: Follow the Four-Step Licensing Process

Step 3A: Local Zoning & Property Review

- ☐ Complete before committing to a property.
- ☐ Local zoning authority identified
- ☐ Property zoning verified
- ☐ Business activity allowed at location
- ☐ Building approved for intended use
- ☐ Parking, traffic, and delivery requirements reviewed
- ☐ Signage and outdoor-use rules reviewed
- ☐ Change-of-use requirements reviewed
- ☐ Existing violations or restrictions checked
- ☐ Utility and infrastructure requirements confirmed
- ☐ Lease contingencies considered
- ☐ Written zoning confirmation saved



Step 3B: State Registration & Licensing

- ☐ State business portal located
- ☐ Sales tax permit or seller's permit obtained
- ☐ State tax registrations completed
- ☐ Employer registrations completed
- ☐ Unemployment insurance requirements completed
- ☐ Workers' compensation requirements reviewed
- ☐ Professional or occupational licenses identified
- ☐ Industry regulators identified
- ☐ Required certificates and account numbers saved

Step 3C: Federal Licensing Review

- ☐ Federal licensing requirements reviewed
- ☐ Appropriate federal agency identified
- ☐ Federal permits or approvals obtained
- ☐ Federal reporting and recordkeeping requirements reviewed
- ☐ Federal excise tax requirements reviewed

Step 3D: Local Business Permits

- ☐ Local business license obtained
- ☐ Building permits secured
- ☐ Fire review completed
- ☐ Occupancy requirements completed
- ☐ Sign permits obtained
- ☐ Home occupation permit obtained (if applicable)
- ☐ Temporary event permits obtained (if applicable)
- ☐ Mobile business permits obtained (if applicable)
- ☐ Processing timelines and deadlines tracked
- ☐ Permit numbers recorded

Step 4: Industry-Specific Licensing

- ☐ Business-level licenses identified
- ☐ Facility or establishment licenses identified
- ☐ Employee licenses and certifications identified
- ☐ Education, testing, or training completed
- ☐ Background checks completed
- ☐ Insurance and bond requirements satisfied
- ☐ Public-display requirements confirmed
- ☐ Renewal requirements documented



Step 5: Special Business Types

Home-Based Businesses

- ☐ Home occupation requirements reviewed
- ☐ Parking restrictions reviewed
- ☐ Customer access requirements reviewed
- ☐ HOA, condo, or lease restrictions reviewed
- ☐ Cottage-food requirements reviewed (if applicable)

Online Businesses

- ☐ Business locations documented
- ☐ Employee locations documented
- ☐ Inventory locations documented
- ☐ Sales tax obligations reviewed
- ☐ Professional licensing requirements reviewed
- ☐ Multistate requirements reviewed

Mobile and Temporary Businesses

- ☐ Jurisdiction-specific requirements reviewed
- ☐ Vehicle permits reviewed
- ☐ Vendor permits obtained
- ☐ Event approvals obtained
- ☐ Insurance requirements verified
- ☐ Tax registrations completed

Step 6: Food & Beverage Businesses

- ☐ Complete only if applicable.
- ☐ Health department identified
- ☐ Food establishment permit obtained
- ☐ Plans submitted and approved
- ☐ Equipment approved
- ☐ Food safety requirements met
- ☐ Storage and refrigeration standards met
- ☐ Employee food-safety certifications obtained
- ☐ Alcohol licenses obtained
- ☐ Server training completed
- ☐ Pre-opening inspection passed

Step 7: Applications & Inspections

- ☐ For every license, permit, registration, or approval:
- ☐ Requirements verified
- ☐ Documents gathered



- ☐ Application submitted
- ☐ Fee paid
- ☐ Confirmation number saved
- ☐ Inspection completed
- ☐ Corrections completed
- ☐ Reinspection completed (if required)
- ☐ Final approval issued
- ☐ Approval details verified
- ☐ Approval records saved

Step 8: Opening Day Verification

- ☐ Before opening:
- ☐ All licenses issued
- ☐ All permits issued
- ☐ Occupancy approval received
- ☐ Required inspections completed
- ☐ Insurance active
- ☐ Tax accounts active
- ☐ Employee credentials active
- ☐ Required documents posted
- ☐ Business information matches all approvals
- ☐ Final approval records stored
- ☐ Do not open based solely on an application submission, receipt, inspection appointment, or verbal approval.

Step 9: Renewals & Ongoing Compliance

- ☐ License numbers recorded
- ☐ Permit numbers recorded
- ☐ Renewal dates recorded
- ☐ Renewal reminders created
- ☐ Employee credentials monitored
- ☐ Insurance renewals tracked
- ☐ Continuing education tracked
- ☐ Renewal confirmations stored
- ☐ Annual compliance review scheduled

Business Change Review Checklist

- ☐ Recheck licensing requirements before:
- ☐ Moving locations
- ☐ Opening another location
- ☐ Remodeling



- ☐ Changing ownership
- ☐ Changing legal structure
- ☐ Adding products or services
- ☐ Selling alcohol
- ☐ Increasing occupancy
- ☐ Adding entertainment
- ☐ Starting delivery or catering
- ☐ Adding mobile sales
- ☐ Expanding into another state
- ☐ Hiring licensed professionals
- ☐ Closing a location

License and Permit Tracker

REQUIREMENT
WHY IT APPLIES
AGENCY
OFFICIAL SOURCE
APPLICATION DEADLINE
FEE
PROCESSING TIME
APPLICATION NUMBER
CURRENT STATUS
NEXT ACTION
NEXT ACTION DUE DATE
APPROVAL NUMBER
EFFECTIVE DATE
EXPIRATION DATE
RENEWAL WINDOW
NOTES