

Business Registration Checklist

- ☐ **Choose a business structure.** Compare ownership, personal liability, tax treatment, filing requirements, management needs, and future funding plans. Consult an attorney or accountant if you are unsure which option fits your goals.
- ☐ **Select and check your business name.** Choose a distinctive name, search your state's business database, check domain and social media availability, and review similar trademarks before committing to the name.
- ☐ **Reserve the name if needed.** Follow your state's reservation process, keep the confirmation, and wait for formal approval before ordering signs, letterhead, packaging, or other branded materials.
- ☐ **Complete Secretary of State registration.** Prepare the required formation documents, confirm the business and mailing addresses, identify the registered agent, list owner or member information, pay the filing fee, and save the approved documents and receipt.
- ☐ **Complete any additional name filings.** If you will operate under a name different from the legal business name, determine whether a DBA or assumed-name registration is required by the state, county, or city.
- ☐ **Obtain an Employer Identification Number.** Form the legal entity first, when applicable, then apply directly through the IRS. Save the EIN confirmation with your permanent business records.
- ☐ **Identify licenses, permits, and zoning requirements.** Check federal, state, county, and city rules based on your industry, location, and activities. Apply for required sales tax, health, food service, home occupation, professional, or zoning approvals before opening.
- ☐ **Open a business bank account.** Gather your EIN, approved registration documents, operating agreement or bylaws, and government-issued identification. Use the account only for business income and expenses.
- ☐ **Register for state and local taxes.** Determine whether you need sales tax, payroll, withholding, unemployment, income, franchise, or other tax accounts. Record filing frequencies and payment deadlines.
- ☐ **Protect your brand.** Secure relevant domain names and social media handles, document ownership of original content, search for similar marks, and consider federal trademark registration for eligible names, logos, or slogans.
- ☐ **Organize your records.** Keep formation documents, tax identification notices, licenses, permits, banking records, agreements, and filing receipts in a secure and accessible location.
- ☐ **Create a compliance calendar.** Track annual reports, registration renewals, tax filings, permit expirations, registered agent updates, and trademark maintenance dates. Review the calendar regularly and update agencies when key business information changes.