



Tax and Bookkeeping Svc.

New Company Setup Checklist

COMPANY INFORMATION	
Company name:	
Address:	
Telephone number:	
Fax number:	
Email Address:	
Date business started:	
Number of owners:	
CHECKLIST	
<input type="checkbox"/>	Choose type of business entity.
<input type="checkbox"/>	Choose an accounting method:
<input type="checkbox"/>	Select end of fiscal year.
<input type="checkbox"/>	Apply for IRS Employer Identification Number
<input type="checkbox"/>	Register with state as a business.
<input type="checkbox"/>	Obtain county and city business licenses/tax IDs.
<input type="checkbox"/>	If corporation, file letters of incorporation. If partnership, create and sign partnership agreement.
<input type="checkbox"/>	Purchase insurance plan(s).
<input type="checkbox"/>	Create company Web site. Web site address:
<input type="checkbox"/>	Select and purchase accounting software.
<input type="checkbox"/>	Install and set up accounting software.
<input type="checkbox"/>	Open a business banking account.
<input type="checkbox"/>	Obtain a business credit card.
<input type="checkbox"/>	Establish a salary agreement for each owner.
<input type="checkbox"/>	Establish a retirement plan.