



New Company Setup Checklist

COMPANY INFORMATION	
Company name:	
Address:	
Telephone number:	
Fax number:	
Date business started:	
Number of owners:	
CHECKLIST	
<input type="checkbox"/> Choose type of business entity. Business entity type:	
<input type="checkbox"/> Select end of fiscal year. Fiscal year-end:	
<input type="checkbox"/> Apply for IRS Employer Identification Number (EIN), if applicable.	*BTAS
<input type="checkbox"/> Register with state as a business.	*BTAS
<input type="checkbox"/> Obtain county and city business licenses.	
<input type="checkbox"/> If corporation, file letters of incorporation. <input type="checkbox"/> If partnership, create and sign partnership agreement.	*BTAS
<input type="checkbox"/> Purchase insurance plan(s).	
<input type="checkbox"/> Create company Web site. Web site address:	
<input type="checkbox"/> Choose an accounting method:	
<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"/> Consider contracting with payroll processing firm and/or record-keeping firm.	*BTAS
<input type="checkbox"/> Establish a salary agreement for each owner.	
<input type="checkbox"/> Establish a retirement plan.	

*BTAS – Contact our offices to complete these tasks for you!