



Business Startup Checklist

Bring available documents and note items you still need.

Business Name & Purpose:

Preferred business name and backup names; products or services; intended customers.

Owner Information:

Owner names, contact information, roles and ownership percentages; questions about the business structure.

Location & Contact Details:

Business and mailing addresses, phone, email, operating state and any planned additional locations.

Existing Registrations:

Bring any state formation documents, EIN confirmation, assumed-name filings and registration correspondence already received.

Licensing & Permits:

List the business activities and locations; bring existing licenses, permits or notices for review.

Startup Budget & Funding:

Estimated startup costs, monthly expenses, funding plans, equipment needs and expected income.

Banking & Bookkeeping:

Available bank or bookkeeping records, receipts for startup purchases and questions about tracking income and expenses.

Brand & Business Documents:

Logo or brand materials, website plans, proposed agreements and trademark-related records, if available.

Your Next Steps:

Target start date, documents still needed and the questions you want to discuss at your consultation.

Preparation list for your consultation; some items may not apply.

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Reference: <https://www.sba.gov/counseling/launch-your-business/>