



STARTUP CHECKLIST

- **Write a business plan.** Form goals and objectives for your new company. A successful start to any business requires a detailed outline of what you plan to accomplish. For help writing your plan, [request a free business plan consultation today.](#)
- **Obtain start-up capital.** Whether you use your own savings or obtain loans, starting a business requires money. Capital Connections has access to the funding you need for your startup or growing business.
- **Set up a legal business structure.** Forming a corporation or LLC can protect owners' personal assets from business debts. Additionally, incorporating can provide credibility and tax benefits.
- **Register "Doing Business As" names.** Will your corporation or LLC do business under a name other than its legal name filed with the Secretary of State? If so, it must file a DBA (Doing Business As) name.
- **Appoint a Registered Agent.** Businesses must maintain an address for service of process where legal documents can be received.
- **Protect your company's name.** Businesses file names on a per-state basis, so other companies may be using the same or a similar name in other states. Conducting a **trademark search** insures your unique company name isn't already in use.
- **Obtain a Federal Employer Identification Number (EIN).** Incorporated businesses and companies that hire employees must obtain an EIN..
- **Satisfy business licensing requirements.** Identify typical requirements for your business activities. Most state, county, and local governments require businesses to obtain licensing before they begin to operate. We can provide you with the application forms and contact information for the appropriate agencies.
- **Draft internal documents for the business.** Corporations are governed by their internal bylaws, whereas LLCs are governed by an operating agreement. Capconx can assist in providing customized bylaws or an LLC operating agreement [f](#)or your business.
- **Satisfy insurance requirements.** Incorporating or forming an LLC does not provide a company with business insurance. Most companies obtain general business insurance from an insurance provider. Corporations and LLCs that hire employees also typically obtain unemployment and workers compensation insurance. Capconx has partners to offer you a wide array of business insurance services you can afford and trust.
- **Establish a business presence.** Identify a location for the business and establish a business address. Capconx can assist you in finding the right location for your business.

- **Establish a Web presence.** Not having an effective Web site eliminates opportunities for new customers and more profit. Let us help you [design, develop, and market a Web site](#). If you already have a Web site, we can help you market that site more effectively.
- **Develop business collateral.** Businesses use customized letterhead, cards, and forms with their company name and logo to establish credibility. Get the professional look you desire from us.
- **Open a bank account and merchant account.** To protect their corporate or LLC veil, businesses must maintain separate business and personal accounts and records. Establish a separate business bank account so that your personal assets are not co-mingled with business funds. Banks may also require an [Employer Identification Number \(EIN\)](#) in order to open a business checking account. Need to provide customers with flexible methods to purchase products and services from your business? For credit card processing services, let us recommend one of our partners to you.
- **Establish proper accounting procedures.** Paying your taxes is only part of the picture when it comes to setting up your business. Whether you need help setting up your chart of accounts, have questions about completing a specific tax form, or need answers to tax questions we can help. Request a [30 or 60 minute consultation](#) with a recommended accountant to discuss your unique situation and get the answers you need.
- **Get a Business Credit Card.** A business credit card helps separate your professional and personal expenses and can help you protect your personal assets from business liabilities.
- **Identify where to get help.** Smart business owners know where and when to seek advice from other sources. Let us help you identify attorneys and accountants in your area who can assist you with specific questions about your business, or contact us to help identify a solution to meet your needs.
- **Get started.** Schedule an opening day for your business. Giving yourself a goal helps keep things on track. and can increase your productivity.
- **Complete additional filings as needed.** Companies that expand to do business outside their original state of incorporation or LLC formation generally register in the additional states .
- **Follow government rules.** Operating a small business means satisfying ongoing government and legal requirements to maintain the company's good standing. Stay aware of the steps needed to maintain your company's status.