

## QuickBooks New Business Checklist



### Steps to Startup Success

Take some of the worry out of starting a business. From focusing your idea to seeking funding, this guide will walk you through the process. There are some activities, such as marketing and customer development, that are too specific to the kind of business you run to be covered here, so the guide isn't exhaustive, but it's a good place to start.

If you've already started your business, working through the checklist will ensure you haven't forgotten anything.

Note: You don't have to do the entire checklist at once. You can mark the steps you've completed then click Save Checkmarks. When you return to the checklist, you'll easily be able to see what you've already done.

#### 1. Conceive your business

[Save Checkmarks](#)[Clear Checkmarks](#)

- A. [Focus your idea](#)
- B. [Research your idea](#)
- C. [Choose a name](#)
- D. [Write a business plan](#)

#### 2. Structure your business

- A. [Choose an organization type](#)
- B. [Consult professionals](#)
- C. [Set up your financial systems](#)

#### 3. Prepare all necessary forms, permits, and licenses

- A. [Overview of federal, state, and local requirements](#)
- B. [File company papers with the Secretary of State's office](#)
- C. [Obtain a federal tax identification number](#)
- D. [Register your business name](#)
- E. [Obtain all necessary licenses and permits](#)
- F. [Fulfill all employer requirements](#)
- G. [Secure intellectual property](#)
- H. [Take care of local requirements](#)

#### 4. Fund your business

- A. [Use your own assets](#)
- B. [Borrow from friends and family](#)
- C. [Borrow from a bank](#)
- D. [Check with minority or women's organizations](#)
- E. [Apply for a grant](#)
- F. [Other sources of equity funding](#)

#### 5. Taxes and insurance

- A. [Fulfill all tax requirements](#)

- B. Keep detailed records of all deductible expenditures**
- C. Obtain insurance**