

FILLABLE WORKSHEET

Business Setup Checklist

Use this worksheet to organize the basic information and next steps for starting, moving, or strengthening your business.

Your entries stay inside the PDF on your device. Do not enter Social Security numbers, banking passwords, payment-card details, or other sensitive credentials.

LEGAL BUSINESS NAME

OWNER OR PRIMARY CONTACT

BUSINESS START DATE

EMAIL

PHONE

BUSINESS ADDRESS

MAILING ADDRESS, IF DIFFERENT

BRIEF DESCRIPTION OF BUSINESS ACTIVITY

Six practical steps

Check each item as you complete it. Use the notes field for agency contacts, confirmation numbers, deadlines, or questions to resolve.



Choose your setup

Clarify the business activity, ownership, entity structure, and records you need.



Register and check permits

Complete applicable state filings and confirm city, county, industry, and Fullerton registration requirements.



Plan your addresses

Separate business, mailing, registered-agent, customer-facing, and workspace address roles.



Prepare banking and records

Ask the bank for its current document list and keep names and addresses consistent.



Set up mail and communication

Decide how mail, packages, customer messages, and account notices will be handled.



Choose workspace and review

Select workspace as needed and schedule regular checks of registrations and account details.

NOTES AND FOLLOW-UP