

Business Information Organizer

An organized worksheet for keeping important non-sensitive business information in one place.

RESOURCE TYPE	ACCESS	VERSION	UPDATED
Worksheet	Instant access	Version 1.0	August 2026

Security Warning

Do not store passwords, PINs, full card numbers, online banking credentials, authentication codes, or other sensitive login details in this sheet.

Business Identity

Information	Your Details
Legal business name	
DBA or trade name	
Entity type	
Formation state and date	
State registration or file number	
EIN, if applicable	

Business Contact

Information	Your Details
Principal business address	
Mailing address	
Registered agent	
Business phone and email	
Website or domain	

Financial & Operations

Information	Your Details
Bank name and account type only	
Licenses, permits, and renewal dates	
Insurance information	
Accountant, bookkeeper, attorney, or other professional contacts	
Important platforms and providers	

Continue Your Journey

After organizing your business information, create a compliance calendar for verified deadlines and renewal dates.

Sources & References

Open a business bank account - U.S. Small Business Administration - <https://www.sba.gov/business-guide/launch-your-business/open-business-bank-account>