

NINZ FREE RESOURCES

Business Startup & Foundation Checklist

A practical checklist to help new and early-stage business owners organize foundational business considerations before moving forward.

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

What This Helps You Do

Use this checklist to organize the early decisions, records, and questions that often come up when starting or strengthening a small business.

- Clarify your business idea and intended customer.
- Organize business identity information.
- Identify registrations, licenses, permits, and tax items that may apply.
- Prepare contact, banking, and recordkeeping foundations.
- Decide where professional help may be needed.

Who It Is For

This resource is for business owners who want a plain-language starting point. It is especially useful if you are still organizing your business name, structure, records, contact information, compliance reminders, or next steps.

How to Use This Checklist

1. Read each section before taking action.
2. Mark items that apply to your business.
3. Write down questions that need official verification.
4. Use the related FAQs to understand topics before making decisions.
5. Review the checklist periodically as your business changes.

This is an educational checklist, not a universal legal sequence. Some items may not apply to your business.

Status Options

☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
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Educational Disclaimer

A practical checklist to help new and early-stage business owners organize foundational business considerations before moving forward.

General business education. Requirements vary by business, industry, and jurisdiction. Verify applicable requirements with official agencies or qualified professionals.

Business Idea

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Define your product or service.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify your intended customer.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Complete basic market research.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Consider whether a business plan would help.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Business Idea

Business Identity

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Research possible business names.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Consider business structure options.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify registration steps that may apply.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Document DBA or trade-name questions if relevant.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Business Identity

Business Identifiers

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Determine whether you need an EIN.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify state or local registrations that may apply.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Store business identification details in an organized place.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Business Identifiers

Business Contact Foundation

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Consider what address is appropriate for each business purpose.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Consider whether a business phone number would help.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Create or organize a business email address.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Review domain and online presence needs.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Business Contact Foundation

Financial Organization

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Determine whether a business bank account is appropriate.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify payment methods you may need.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Set up a recordkeeping or bookkeeping process.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Store financial records in an organized way.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Financial Organization

Compliance

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Identify licenses or permits that may apply.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify tax registrations that may apply.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Determine whether registered-agent requirements apply.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Track ongoing filing, renewal, or reporting responsibilities.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Compliance

Next Steps

CHECKLIST ITEM	DONE	NEED TO DO	NEED TO VERIFY	NOT APPLICABLE
Create a compliance calendar.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Store important documents.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Identify professional help needed.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable
Review your business foundation periodically.	☐ Done	☐ Need to Do	☐ Need to Verify	☐ Not Applicable

Notes for Next Steps

Continue Your Journey

After completing this checklist, organize your key business details in one place and create a calendar for verified renewal dates, filing dates, and important reminders.

Sources & References

Business Guide

U.S. Small Business Administration - <https://www.sba.gov/business-guide>

Register your business

U.S. Small Business Administration - <https://www.sba.gov/business-guide/launch-your-business/register-your-business>

Apply for licenses and permits

U.S. Small Business Administration - <https://www.sba.gov/business-guide/launch-your-business/apply-licenses-permits>