



# Checklist for Steeling Your Foundations

This checklist covers the foundational pieces every business needs to start strong and grow with confidence. From financial planning to operational essentials, use it to ensure nothing is overlooked on your journey to success.

# Basics

Name your business

Define your business's purpose

Create core values

Create mission statement

Obtain Employer Identification Number

Get a Registered Agent

Decide whether you will incorporate your business or not

If incorporating, file the necessary paperwork

# Financial Management

Current Business Income

Goal Business Income

Get a Bookkeeper or Accountant

Decide on a bookkeeping software to use

Create a budget

# Business Structure and Planning

Choose a business structure (Sole Proprietor, Partnership, LLC, Corporation)

Decide on the internal structure (think chain of command) of your business

# Operational Plans

■ Create a disaster plan (natural disasters, active shooters, untimely deaths, major injuries etc.)

■ Create file organization procedures (how client information, project documents, employee files, etc. are handled, moved, and stored)

■ Create a plan for scaling your business

■ Create a rhythm plan (how the company handles peaks, slow periods, worker shortages, system failures, etc.)

■ Create a succession plan (who gets control of your company when your time is up?)

# Funding

Write out a detailed plan for  
obtaining funding for your  
business

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# Contact Us

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