

Business entity and EIN checklist

Use this checklist for the actual service, product, site and jurisdiction. Leave missing evidence unresolved until the responsible person confirms it. Record the decision and its source before proceeding.

Business job date and responsible person

- ☐ Write the exact legal name, owners, operating name and business activities.
- ☐ Compare entity options with qualified tax and legal help.
- ☐ Verify name availability and registration requirements with the state authority.
- ☐ Complete the official state registration and retain the confirmation.
- ☐ Determine EIN eligibility and use the official IRS application.
- ☐ Retain the EIN notice and provide it only to authorized account or payroll processes.
- ☐ Record local registration, employer, tax and renewal obligations.
- ☐ Set up separate banking and records using the exact legal identity.

Unresolved items evidence and next action

Decision owner and follow up date

Sources and record notes

Author NPMCA. Worksheet version 1.0; guide record as of 2026-10-11. Technical limits and prices must come from the exact current product instructions, official rule or dated written quote.

SBA launch your business: <https://www.sba.gov/business-guide/launch-your-business>

IRS EIN: <https://www.irs.gov/businesses/small-businesses-self-employed/get-an-employer-identification-number>

Guide: <https://www.npmca.org/start/business-entity-ein>