

# LLC Formation Checklist

## Choose Your State

- Research state-specific LLC regulations and costs

- Notes: \_\_\_\_\_

- Select your preferred state

- Selected State: \_\_\_\_\_

## Select Your LLC Name

- Ensure the name complies with state guidelines and is unique

- Use your state's business registry to verify availability.

- Enter your desired LLC name for review

- Desired Name: \_\_\_\_\_

- Secure your LLC name

- Confirmation Number (if applicable): \_\_\_\_\_

## Designate a Registered Agent

- Appoint a registered agent for your LLC

- Registered Agent Name: \_\_\_\_\_

- Physical Address: \_\_\_\_\_

- Confirm the agent's availability and compliance with state requirements.

## File Articles of Organization

- Prepare the Articles of Organization

- Include LLC Name, Address, Members, and Registered Agent details.

- Submit the Articles to your state

- Submission Date: \_\_\_\_\_

- Filing Fee: \$\_\_\_\_\_

- Receive confirmation of filing

- Confirmation/Reference Number: \_\_\_\_\_

## Create an Operating Agreement

- Draft an Operating Agreement specifying the roles and responsibilities of members

- Key Provisions:

- Profit Distribution: \_\_\_\_\_

- Decision-Making Process: \_\_\_\_\_

- Dispute Resolution: \_\_\_\_\_

- Have all members sign the Operating Agreement

## Obtain an Employer Identification Number (EIN)

- Apply for an EIN through the IRS (online or via mail)

- EIN Application Date: \_\_\_\_\_

- Receive EIN

- EIN: \_\_\_\_\_

## Secure Permits and Licenses

- Research required local, state, and federal permits/licenses

- Industry-Specific Permits: \_\_\_\_\_

- Zoning Approvals: \_\_\_\_\_

- Apply for and obtain necessary permits/licenses
  - Approval Dates: \_\_\_\_\_
- Open a Business Bank Account**
  - Choose a financial institution for your LLC's bank account
    - Bank Name: \_\_\_\_\_
  - Gather required documents
    - EIN: [ ] Operating Agreement: [ ] Articles of Organization: [ ]
  - Open the account
    - Account Number: \_\_\_\_\_
- Comply with State and Federal Regulations**
  - File annual reports and pay state fees
    - Due Date: \_\_\_\_\_
  - Stay updated on regulatory changes affecting your LLC
    - Notes: \_\_\_\_\_
- Optimize LLC Management**
  - Set up a system for record-keeping
    - Preferred Method (e.g., software): \_\_\_\_\_
  - Establish financial and legal support
    - Accountant: \_\_\_\_\_
    - Attorney: \_\_\_\_\_
  - Ensure payroll systems and tax compliance are in place.