



# **Business Formation Checklist**

Client Resource Guide

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## Business Formation Checklist

Starting a new business involves careful planning and legal compliance. This checklist outlines key steps and documents that entrepreneurs, startups, and healthcare professionals should consider when forming an LLC or corporation. Consult legal counsel for tailored guidance.

### Key Steps:

- Choose a business structure (LLC, Corporation, Partnership, etc.).
- Select and register your business name.
- Prepare and file Articles of Incorporation/Organization.
- Draft an Operating Agreement or Shareholder Agreement.
- Obtain an Employer Identification Number (EIN) from the IRS.
- Register with state and local tax authorities.
- Apply for necessary business licenses and permits.
- Open a business bank account.
- Establish initial corporate records (minutes, resolutions, ownership ledgers).
- Ensure compliance with industry-specific regulations (healthcare, education, etc.).
- Consult with legal and tax professionals to optimize governance and liability protections.

*This checklist is provided for general informational purposes only and does not constitute legal, tax, or financial advice. Use of this checklist does not create an attorney-client relationship with Shkoukani LLP. Every business formation is unique, and you should consult with qualified legal and tax professionals regarding your specific circumstances before making decisions.*

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