



# start.up.form

## start.up.checklist

	Company File Information	Notes/Questions (if unknown, leave blank)
<input type="checkbox"/>	Company Name	
<input type="checkbox"/>	Company's Legal Name	
<input type="checkbox"/>	Company Address	
<input type="checkbox"/>	Federal EIN or Social Security Checklist	
<input type="checkbox"/>	Your Fiscal Year begins on what date? (Typically the beginning of the year)	
<input type="checkbox"/>	Income Tax Form Used (if unknown, what is your business filing as? LLC, Sole proprietorship, S-Corp, etc.)	
<input type="checkbox"/>	Accounting Basis (Cash or Accrual)	
	<b>Accounts</b>	
<input type="checkbox"/>	Statements and Balances (from start date through today) of: bank account(s), credit card(s), loan(s), and lines of credit	
<input type="checkbox"/>	Value of assets (including original cost and accumulated depreciation for fixed assets)	
<input type="checkbox"/>	Equity Information including all owner's contributions, plus retained earnings for each year the company has been operating	
	<b>Customer &amp; Jobs Info</b>	
<input type="checkbox"/>	Customer numbering scheme (if applicable)	
<input type="checkbox"/>	Applicable Customer Info: names, addresses, contact info, taxable status, etc.	
<input type="checkbox"/>	Customer payment terms	
<input type="checkbox"/>	Customer shipping methods	
<input type="checkbox"/>	Customer types	
<input type="checkbox"/>	Open balances or outstanding invoices as of the start date	