California Business Startup Checklist

Tick each step as you start a business in California. Based on Secretary of State, FTB, IRS, CDTFA and EDD pages as of November 2026; general information, not legal or tax advice.

Business name _____ **Structure** _____

Owner _____ **Opening date** _____

Adviser _____ **Date** _____

Structure and name

- ☐ Structure chosen: sole proprietorship, LLC or corporation
- ☐ Structure and tax setup reviewed with an attorney or tax adviser
- ☐ Name checked in the Business Search on bizfile Online
- ☐ Brand name searched in the federal trademark records
- ☐ LLC name includes LLC, L.L.C. or limited liability company
- ☐ Fictitious business name filed with the county if you trade under another name

State filing for an LLC (corporations use their own bizfile forms)

- ☐ Agent for service of process chosen: California resident or 1505 corporate agent
- ☐ Articles of Organization (Form LLC-1) filed on bizfile Online
- ☐ bizfile user access set up for online filings
- ☐ Operating agreement agreed by the members and kept on file (not filed with the SOS)
- ☐ First Statement of Information (LLC-12) filed within 90 days of registration

Tax numbers and permits

- ☐ EIN requested from the IRS after the state filing (free online)
- ☐ Federal tax treatment of the LLC discussed with a tax adviser
- ☐ Seller's permit from CDTFA if you sell or lease goods (no fee)
- ☐ Separate seller's permit checked for each location
- ☐ Marketplace-only sales: marketplace's CDTFA registration confirmed before skipping your own permit

Location and local license

- ☐ Zoning checked with the city or county before signing a lease
- ☐ Business license applied for with the city (or county, outside city limits)
- ☐ Permits for your trade looked up on CalGold by city, county and business type
- ☐ Working from home: noted that the filed business address is public record

Hiring

- [ ] Registered with EDD within 15 days of paying over $100 in wages in a quarter
- [ ] Employer payroll tax account number recorded
- [ ] EIN in hand before the first payroll
- [ ] Workers' comp policy in force before the first employee starts

Insurance before opening

- [ ] Named insured matches the registered name (owner name with DBA, or the company)
- [ ] Lease and client contracts read for insurance limits and certificate requests
- [ ] General liability quote requested before opening
- [ ] Business owner's policy considered for a shop, office or stock
- [ ] Policy start date set for the opening day

Yearly upkeep

- [ ] LLC annual tax paid to the FTB with Form 3522 by its due date
- [ ] Form 568 filed every year, even with no income
- [ ] Statement of Information filed every two years in its window
- [ ] New Statement of Information filed when an address or the agent changes
- [ ] Insurance reviewed when you hire, move or add products

Notes