

New-Business Tax Setup Checklist

Sequence federal, state, local, payroll, sales-tax, bookkeeping, recordkeeping, and filing-calendar setup for a new business.

FREE PDF RESOURCE	Free to view, download, print, and use internally as a general guide.
PUBLIC FORMAT	Watermarked public edition. Editing, assembly, and extraction are disabled in compliant PDF readers.
REUSABLE WORD VERSION	Available when this resource relates to a paid RiskWise engagement.

What this free resource includes

01 Entity and registrations

02 Federal tax setup

03 State and local setup

04 Books and banking

05 Calendar and ownership

Use the working pages to collect facts, owners, evidence, and dates. Review tax, legal, security, licensing, employment, insurance, or regulatory decisions with the qualified professional appropriate to your facts.

Work through New-Business Tax Setup Checklist

Record what is known, identify the source, assign an owner, and make missing information visible.

Entity and registrations

Purpose / facts / owner / evidence / date:

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Federal tax setup

Purpose / facts / owner / evidence / date:

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State and local setup

Purpose / facts / owner / evidence / date:

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Finish the record and confirm the next step

Complete the remaining sections, then identify what needs review, approval, secure delivery, implementation, or follow-up.

Books and banking

Purpose / facts / owner / evidence / date:

Calendar and ownership

Purpose / facts / owner / evidence / date:

Choose the support you need

FREE PDF	Free	Use this public edition as an internal reference or printed working guide.
REUSABLE WORD TEMPLATE	Included	An editable Word version is available when it supports a related paid engagement.
CUSTOM WORK	Scoped	RiskWise can adapt, review, implement, document, or hand off the resource for your business.

Discuss a paid engagement

Call 702-421-1111 or email sales@ezypz.com and mention: New-Business Tax Setup Checklist

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