



## Business Set-up Checklist

Page two of this document should be printed out and be available to you throughout your business set-up, development, and launch.

The checklist does not need to be followed in sequence, but the sequence provided is a relatively logical flow.

The checklist begins with some very basic information about your goals. If you're the type who needs a little nudge now and then, this may help you stay on track. But in no case allow this checklist to become a negative influence in the event you get behind. Never give in just because you may have missed a self-imposed deadline.

The checklist is simple - you have a task or element to accomplish and a started date. Regardless of how organized you are, or think you are, this checklist puts all of your required steps on one page, and easily lets you track or remember where you were. Use the back side for names, numbers, etc. as you make contacts.

The checklist compiled is a very good starting point, but feel free to add to this. We believe that each of the listed items with exception of obtaining LLC EIN, is required. Some items require several steps for instance, "create business card, brochure & portfolio" - this actually involves the creative (the images and words) plus what sort of stock to print on, locating a printer and in the case of a portfolio, locating your folder jacket. All easy enough - but multi stepped task.

Human nature for most people is to tackle the easiest thing first, and put off that tougher task until later. You are the boss, but we strongly suggest getting something you feel will be difficult, out of the way early. For most this involves obtainment of your business licensing. This is not hard, but anything new and which may require travel to an administrative complex can become slightly more difficult. We all like easy - and that is exactly what your new service will be to your clients.

Check the box when a certain task is completed - when all boxes are checked (or not required) you should be ready for business.



## Business Set-up Checklist

*The date I anticipate my Personal Chef Service to be “open for business” is \_\_\_\_/\_\_\_\_/\_\_\_\_.*

### **Date started of task or requirement**

- ❖ Write Business Plan \_\_\_\_/\_\_\_\_
- ❖ Research & decide on business name \_\_\_\_/\_\_\_\_
- ❖ Complete Culinary Business Institute Exams \_\_\_\_/\_\_\_\_
- ❖ Apply for state and/or city business license \_\_\_\_/\_\_\_\_
- ❖ Apply for EIN (if LLC) \_\_\_\_/\_\_\_\_
- ❖ Locate web host, templates, designer, tech service \_\_\_\_/\_\_\_\_
- ❖ Investigate & obtain liability insurance \_\_\_\_/\_\_\_\_
- ❖ Write business policies \_\_\_\_/\_\_\_\_
- ❖ Learn what taxes you need to pay or collect \_\_\_\_/\_\_\_\_
- ❖ Create customized forms (invoices, etc.) \_\_\_\_/\_\_\_\_
- ❖ Decide your accounting method & who/how \_\_\_\_/\_\_\_\_
- ❖ Set up your home office \_\_\_\_/\_\_\_\_
- ❖ Obtain business phone line \_\_\_\_/\_\_\_\_
- ❖ Create business card, brochure & portfolio \_\_\_\_/\_\_\_\_
- ❖ Decide your pricing method(s) \_\_\_\_/\_\_\_\_
- ❖ Assemble your mobile kitchen & pantry \_\_\_\_/\_\_\_\_
- ❖ Locate packaging provider & obtain initial supply \_\_\_\_/\_\_\_\_
- ❖ Write initial press release & have contacts ready \_\_\_\_/\_\_\_\_
- ❖ Write recipes, test recipes, trial run of service \_\_\_\_/\_\_\_\_
- ❖ Decide your advertising & have initial ready \_\_\_\_/\_\_\_\_