

HOME



# CaIPac NEW BUSINESS CHECKLIST



This List is designed for a Business in Ventura County California but is applicable anywhere, except for addresses and Local and State regulations and concerns.

Forms and Procedures are usually available on the Web. Go to our web site for more information that we can't get on here in the space we have without clutter. If we can help you let us know (805-988-9540)

## Background work ([more](#))

- Assess your strengths and weaknesses
- Establish business and personal goals
- Assess your financial resources
- Identify the financial risks
- Determine the start-up costs
- Decide on your business location
- Do market research
- Identify your customers
- Identify your competitors
- Develop a marketing plan

## PRELIMINARY CONSIDERATIONS ([more](#))

- Research your business name.
- Write a business plan. ( If you are going for investments or loans)
- Choose the type of organizational structure of your business.

## Start Up Business Considerations ([more](#))

- Select an accountant or accounting methods for example, computers and software. Here we can help call 805-988-9540
- Consider how Information technology can cut your costs and automate the work especially the repetitive work call 805-988-9540
- Select a banker and setup a business account
- Apply for business loans (if applicable) and establish a line of credit
- Obtain business insurance
- Obtain a lease
- Line up suppliers (as applicable)
- Get furniture and equipment
- Join a professional organization if its worthwhile and exists

## NEW BUSINESS CHECKLIST

- Set a starting date
- Get stationary , Business Cards etc.

### Start Up Legal Matters ([more](#))

- Determine the legal structure you will have
- File the legal paperwork with the state(s) you will be conducting business in.
  - In Ventura County a Fictitious Business names are filed with the County Clerk at 800 S. Victoria Ave. Ventura CA. 93009
  - The Web URL for forms etc. is at <http://recorder.countyofventura.org/forms.htm>
  - File with IRS for a Federal ID Number. URL for IRS Forms and Instructions <http://www.irs.gov/businesses/small/>
  - Need a partnership? Its best to have a lawyer but if you do it yourself you can go to <http://www.calpactech.com> to get help.
  - Need a corporation then you'll need a lawyer unless your really good. Some small Business Corporations you can do yourself. Our site at <http://www.calpactech.com> has resources that can help
  - If you are into any retail sales then you will need a Reseller permit from the Board of Equalization xxxxxxxx
  - Obtain personal property tax information
  - Check county and local zoning requirements
  - Check state and local license requirements, especially if your business is strongly regulated. E.g. Food, Contracting etc..

### Start Up Marketing and Sales considerations

- Target ( figure out) your potential customers
- Determine some ways you can advertise yourself to them. We can help you with the use of the Internet for less expensive and more effective advertising through this media
- Once the Door is open Get some pictures and send them to the Press and other Media ( cheap advertising). Don't forget a Web Page and the search engines.
- Establish a marketing plan. Don't forget how to use electronics , Internet, E Mail, Direct Mail , Newspapers ,brochures and printed matter. We can help you with this, call 805-988-9540.