Business Formation & EIN Checklist

Entity setup and records coordination · Fictional administrative workflow

Administrative roadmap

Use this checklist to organize information and supporting records. Requirements vary by state and by the business's circumstances. Verify every filing against the current official government instructions.

Phase	Administrative item	Status / Notes
1 · Plan	Confirm preferred state, entity type, and purpose.	To review
1 · Plan	Verify naming availability and registered agent requirements.	To review
2 · Collect	Gather legal name, addresses, organizer and member details.	To review
2 · Collect	Confirm any industry licensing or foreign registration questions.	To review
3 · Form	Prepare formation documents against the state's official form.	To review
3 · Form	Record submission details and official confirmation.	To review
4 · EIN	Identify actual IRS responsible party and required tax details.	To review
4 · EIN	Choose authorized IRS application channel; record confirmation.	To review
5 · Handover	Archive accepted formation documents and EIN records.	To review
5 · Handover	Create a verified initial/annual filing and renewal calendar.	To review

Important filing notes

EIN fee: The IRS does not charge a government fee to issue an EIN. Administrative service fees, if charged, are separate.
International applicants: IRS online-application eligibility is limited; follow current IRS guidance on international application methods.
Authority: Third-party applicants must have appropriate authorization and must identify the actual responsible party.

Official reference sources

IRS: www.irs.gov/businesses/employer-identification-number
SBA: www.sba.gov/business-guide/launch-your-business/register-your-business
State filing requirements: use the relevant Secretary of State or equivalent state agency.

Handover packet

Accepted state formation filing · Business records index · EIN confirmation · Registered agent details · Open-items list · Recurring compliance register