

Business Start-Up Services

	Simple Start-up	Basic Set-up	Advanced Set-up
Choice of a business name	✓	✓	✓
Analysis and selection of a business entity structure	✓	✓	✓
Obtain a tax identification number	✓	✓	✓
Analysis of required account set-up requirements; Complete new account registrations	✓	✓	✓
Tax classification advice and elections	✓	✓	✓
Monitor Indiana Secretary of State renewals and send bi-annual reminders	✓	✓	✓
Assistance with third-party payroll set-up	✓	✓	✓
Access to trusted referral sources and professional advisors	✓	✓	✓
Checklist for starting a business	✓	✓	✓
DBA filings		✓	✓
Set up of payroll, sales tax, or other industry-based or multi-state taxation requirements		✓	✓
Analysis of nexus		✓	✓
Evaluate and discuss business plan		✓	✓
Assist with identification of potential lenders for financing		✓	✓
Analysis and advice on personal credit score		✓	✓
Assist with evaluation of business location		✓	✓
Assist with selection of accounting software		✓	✓
Assist with development or enhancement of business plan			✓
Help with documentation required for a business loan			✓
Create an initial budget			✓
Strategic planning			✓
Help define best practices and standard operating procedures			✓
Succession planning			✓