

## **CREATING THE BUSINESS PLAN**

### **Select your attorney.**

Does my attorney understand construction?

Have I had my attorney review all my contract forms for consistency and legality?

Do I need a business attorney and a litigation attorney?

Has my attorney successfully defended a builder in a homebuyer lawsuit?

### **Set up a legal business structure.**

Have I reviewed the available business structures and selected the form most beneficial to my business concept?

### **Reserve your corporate name if you will be incorporating.**

Have I researched my business name at the office of the Secretary of State to determine availability?

Have I reserved my business name with the Secretary of State?

### **Protect (trademark) company name.**

Do I need to protect my business name with a trademark registration?

### **Register your DBA names.**

Have I registered my DBA (Doing Business As) name(s) locally?

### **Appoint a Registered Agent.**

Who is the Registered Agent for my company?

Should I change the Registered Agent for my business?

### **Obtain a Federal EIN (Employer Identification Number).**

Do I have a Federal EIN?

### **Obtain a State EIN (Employer Identification Number).**



---

Do I have a State EIN?

**Register for state and local tax payments and deposits.**

**Register for state Sales Tax number (if needed).**

Do I need a state Sales Tax number?

**Satisfy business licensing requirements.**

Does my local building department require a qualification test?

Have I registered as a contractor with my local building department?

Have I set up a process to maintain registrations in good standing from year to year?

**Review local business regulations.**

Do I understand the local business regulations?

**Review local building codes.**

Do I understand the local building codes?

Do I know the formal and informal procedures for challenging building code interpretation?

**Order any required notices (advertisements you have to place) of your intent to do business in the community.**

Have I filed the necessary notices for conducting a business in my jurisdiction?

**Obtain office space, furniture, equipment.**

Will I set my office up in my home or will I lease space locally?

**Build your inside team.**

Who will answer the phone?

How will the phone be answered?

Who will respond to e-mail inquiries?



---

Who will meet with potential Buyers?

Where will those meetings take place?

Who will handle accounting questions?

Who will handle questions from customers relating to jobs in progress?

**Keep entity in corporate compliance.**

Do I have a system in place to handle state-mandated annual reports and renewals to keep my business in good standing?

Who will call annual meetings and record those meetings to demonstrate corporate operation?

**Establish Business-only phone number.**

What is my business phone number?