

# CWE STARTUP CHECKLIST



TEXAS WOMAN'S UNIVERSITY  
JANE NELSON INSTITUTE  
for WOMEN'S LEADERSHIP  
Center for Women Entrepreneurs

## BUSINESS FORMATION

- Prepare Business Plan: LIVEPlan, BMC, SCORE
- Name your Business (unique, catchy, descriptive)
- Purchase Domain Name to match Business Name: (.com is best)
- Select Business Structure \$300+ (LLC, C-Corp, S-Corp) at [Secretary of State webpage](#)
- Apply for Assumed Name (OBA) \$25 County Clerk for Sole Proprietor
- Apply for [Federal Tax ID](#) (EIN) \$0 cost
- Open a Business Bank Account (Take EIN & formation documents)
- [Google Business Profile](#)
- Establish BAIL Team (Banker, Acct, Insurance and Lawyer). Watch: [2022 Veteran Woman Entrepreneur Grant Training: Establishing a B.A.I.L Network](#)

## OPERATIONS

- Location/ Facility (Work from home, office suite, cowork, lease, buy, build)
- Licenses & Permits (verify if required)
  - [SBA Licenses & Permits](#)
  - [TX Business Permits Office](#)
- Manufacturing-- TMAC [Product/ Prototype](#)
- Accounting Software (organize, track sales) bookkeeper, CPA QuickBooks, Xero
- Insurance or Bonding (general liability, health) insurance brokers Set up Electronic Payments: [Square](#); [PayPal.com](#); [Stripe.com](#)
- Set up communications
  - VoIP/Phone: [MagicJack.com](#); [Google Voice](#)
  - [CloudPhone](#)
- Protecting Intellectual Property:
  - [Copyright Info](#)
  - Trademark and Patent info at [www.USPTO.gov](#)
- Contact an Insurance Broker to find a plan for you
  - [HISCOX](#) , [Hartford](#), [Next](#)

## MARKETING

- Create a Marketing Strategy to build customer pipeline
- Email Marketing - [Constant Contact](#)
  - [Mail Chimp](#) (FREE Newsletter <2,000 emails/ month), [MailerLite](#)
  - FREE SURVEY -[Survey Monkey](#)
- Set up a website
  - Free Websites: [Weebly](#), [WIX.com](#),
  - [UENI](#) - websites built for you
  - Create [Google Alerts](#)
- Get Certified:
  - [Women Owned Certification](#)
  - [Texas HUB Certification](#)
    - [Centralized Master Bidder List](#)
- Content Resources:
  - [CANVA](#) - Free stock photos/design
  - [Unsplash](#) - Free stock photos
  - [Capcut](#) - Free Video Editing
  - [Kapwing](#) - Video Creation

## FUNDING OPTIONS

- Self Fund: Cash, Savings, CC, Personal Line of Credit
- Apply for Grants: [TWU](#) , [Hello Alice](#)
- See if you qualify for Loans: [Peoplefund](#) , [Liftfund](#) , [BCL](#)
- Explore external funding:
  - [Venture Capital](#)
  - [Angel Investors](#)
  - [IFUNDWOMEN](#)
  - [TruFund](#)
  - [TSBCI](#)

## MANAGEMENT

- Accounting Software (organize, track sales) bookkeeper, CPA
  - [Mint by Intuit](#)
  - [Wave](#)
- Business Valuation: Buy/Sell a business

# CWE STARTUP CHECKLIST

## Additional Information

### STATE AGENCIES

- TABC – [Texas Alcohol Beverage Commission](#)
- [Texas Comptroller](#) – Pay annual Franchise Tax by May 15th
- Texas Cottage Law – [Home Food Preparation](#)
- [TX HHS Food Establishments](#)
- [TDI – Texas Dept of Insurance](#)
- [TDLR: TX Dept of Licensing and Regulation](#)
- [Texas Office of the Governor Economic Development – Small Business](#)
- [TWC : Texas Workforce Commission](#)

### FEDERAL AGENCIES

- IRS – [Internal Revenue Service](#)
- [Department of Labor](#)
  - [US Bureau of Labor Statistics](#)
  - [Employment and Wage Estimates](#)
- [OSHA – Occupational Safety and Health Administration](#)
- [America's SBDC](#) – Put in your zipcode to find your local office.

### VETERAN RESOURCES

- [TexVet.org](#)
- [Texas Veterans Commission](#)

### LEGAL RESOURCES

- [LegalZoom](#)
- [Texas A&M Law Center](#)
- [Texas Law Help](#)
- [Dallas Volunteer Attorney Program](#)
- [TX Accountants & Lawyers for the Arts](#)
- [State Bar of Texas](#)
- [Baylor Law Entrepreneur Legal Clinic](#)
- [SMU Small Business Legal Clinic](#)