

MASTER CHECKLIST

WEEKLY ACTION ITEMS:

WEEK 1: SET UP YOUR BUSINESS & QUICKBOOKS

- Pick your business name
- Create your LLC
- Sign up for QBOA and complete first module of ProAdvisor training

WEEK 2: SET-UP YOUR BUSINESS & WEBSITE

- Open a business bank account
- Get your business license and EIN
- Create your website and URL

WEEK 3: CREATE A MARKETING PLAN TO GET CLIENTS

- Describe your ideal client
- Brainstorm people & places to help you get clients
- Create a monthly marketing plan

WEEK 4: ONBOARDING YOUR FIRST CLIENT

- Informational interview
- Contract of employment with rates
- Set-up client in QBO, connect to their bank