ROADMAP

First 30 Days After Incorporation

A 30-day operating roadmap for turning a newly formed LLC into a clean, usable business.

Inside this guide

DAYS 0-3

Lock down the foundation

Do not rush into tools before the legal record and company data are clean.

1 Day 0-1

- [ ] Download and back up the accepted formation document and state receipt.
- [ ] Verify the legal name, state entity number, formation date and public status.
- [ ] Record registered-agent and official address details.
- [ ] Create the master company information sheet.

2 Day 2-3

- [ ] Prepare/sign the Operating Agreement.
- [ ] Prepare the EIN application information and apply through an eligible IRS method.
- [ ] Create the permanent folder structure for formation, IRS, banking, payments, accounting and compliance.
- [ ] Add the first state maintenance deadline to the compliance calendar.

DAYS 4-7

Get financially organised

A clean financial setup gives the business a usable operating backbone.

1 Prepare banking

- [ ] Assemble formation document, EIN evidence, Operating Agreement, owner ID, business description and address information.
- [ ] Choose banking options that support your ownership and operating countries.
- [ ] Submit accurate applications and keep a copy of the information provided.

2 Start bookkeeping

- [ ] Choose an accounting/bookkeeping system or a simple controlled ledger.
- [ ] Create revenue and expense categories before transactions accumulate.
- [ ] Record any founder/owner funding as a contribution or other appropriate category rather than ordinary revenue.
- [ ] Set a monthly reconciliation date.

DAYS 8-14

Become client- and payment-ready

Make sure the external business identity matches the legal company behind it.

1 Payments

- [ ] Prepare the payment processor application using the exact LLC and EIN information.
- [ ] Connect the business bank account when available.
- [ ] Use test mode before taking live payments.
- [ ] Set up two-factor authentication, payout alerts and restricted user roles.

2 Client readiness

- [ ] Create invoice and proposal templates in the LLCs legal name.
- [ ] Update contracts so the correct entity is the contracting party.
- [ ] Use a professional support/contact email and an accurate website description.
- [ ] Publish appropriate privacy, terms and refund/cancellation information.

DAYS 15-21

Build the compliance system

The goal is not to become a tax expert. The goal is to know what must be tracked and who is responsible.

1 Federal

- [ ] Confirm the LLCs tax classification and owner-specific filing requirements with a qualified tax professional.
- [ ] If foreign-owned and disregarded, review Form 5472/pro forma Form 1120 obligations and reportable transactions.
- [ ] If taxed as a partnership, review Form 1065 and partner reporting requirements.
- [ ] Save the current IRS and adviser guidance in the tax folder.

2 State and operational

- [ ] Confirm the state annual report/tax due-date rule.
- [ ] Confirm registered-agent renewal and notice-routing process.
- [ ] Review whether employees, inventory, sales-tax activity or physical operations create additional registrations.
- [ ] Add recurring reminders at least 30 days before major deadlines.

! BOI status - September 2026

As of September 2026, U.S.-created companies are exempt from FinCEN beneficial ownership information (BOI) reporting under the final rule effective August 14, 2026. Certain foreign entities registered to do business in the U.S. can still have BOI obligations.

DAYS 22-30

Test the operating loop

By day 30, you should be able to prove the company, receive money, explain the books and see upcoming deadlines.

1 Run a full test

- [ ] Issue a test invoice or draft invoice and verify the legal entity details.
- [ ] Run payment provider test-mode transactions where supported.
- [ ] Confirm bank/payout reconciliation works in the bookkeeping system.
- [ ] Confirm the state registry still shows the expected company status.
- [ ] Review access: bank, payments, email, domain, accounting and document storage.

2 Plan the next 90 days

- [ ] Monthly bookkeeping and reconciliation date
- [ ] Sales pipeline and invoicing rhythm
- [ ] Tax/compliance adviser check-in
- [ ] State and federal due-date reminders
- [ ] Document backup and access review

Day-30 outcome

A clean LLC is not just "formed." It has consistent records, separate finances, a working payment flow, a bookkeeping routine and a calendar for the obligations that actually apply.

REFERENCE

Official sources & important notes

Use this guide as an operating checklist. Requirements vary by ownership, tax classification, state, business activity and where you actually operate.

Current compliance note

As of September 2026, U.S.-created companies are exempt from FinCEN beneficial ownership information (BOI) reporting under the final rule effective August 14, 2026. Certain foreign entities registered to do business in the U.S. can still have BOI obligations.

Official sources reviewed

1. IRS - Instructions for Form SS-4 (EIN)
   https://www.irs.gov/instructions/iss4
2. IRS - Instructions for Form 5472
   https://www.irs.gov/instructions/i5472
3. IRS - Instructions for Form 1065
   https://www.irs.gov/instructions/i1065
4. IRS - Publication 509, Tax Calendars
   https://www.irs.gov/publications/p509
5. FinCEN - Beneficial Ownership Information
   https://www.fincen.gov/boi
6. Delaware Division of Corporations - FAQs
   https://corp.delaware.gov/faqs/
7. Wyoming Secretary of State - Business FAQs
   https://sos.wyo.gov/FAQS.aspx?root=BUS

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