

## SECTION 1 — Business Foundation

- Business name registered with state or local authority *Notes:* \_\_\_\_\_
- Legal structure established (LLC, S Corp, Sole Prop, etc.) *Notes:* \_\_\_\_\_
- EIN obtained from the IRS *Notes:* \_\_\_\_\_
- All business licenses and permits up to date *Notes:* \_\_\_\_\_
- Operating or partnership agreement on file (if applicable) *Notes:* \_\_\_\_\_
- Consistent business address, phone, and email used across documents *Notes:* \_\_\_\_\_

## SECTION 2 — Financial Organization

- Separate business bank account and credit card established *Notes:* \_\_\_\_\_
- Current Profit & Loss, Balance Sheet, and Cash Flow statements prepared *Notes:* \_\_\_\_\_
- Income, expenses, and receipts fully organized *Notes:* \_\_\_\_\_
- Bookkeeping system in use (QuickBooks, Wave, Xero, etc.) *Notes:* \_\_\_\_\_
- Annual budget and financial forecast completed *Notes:* \_\_\_\_\_
- Recent business tax filings accessible *Notes:* \_\_\_\_\_

## SECTION 3 — Business Planning

- Business plan or executive summary completed *Notes:* \_\_\_\_\_
- Mission, vision, and measurable goals defined *Notes:* \_\_\_\_\_
- Target market and customer research documented *Notes:* \_\_\_\_\_
- Marketing or growth strategy outlined *Notes:* \_\_\_\_\_
- Product/service descriptions and pricing documented *Notes:* \_\_\_\_\_
- Team members or partners listed (if applicable) *Notes:* \_\_\_\_\_

## SECTION 4 — Documentation & Compliance

- Digital copies of all licenses, registrations, tax returns, and contracts stored securely *Notes:* \_\_\_\_\_
- Standardized naming and filing system established *Notes:* \_\_\_\_\_
- Business insurance documentation current *Notes:* \_\_\_\_\_
- Contractor or employee agreements on file *Notes:* \_\_\_\_\_

- Compliance with all state and federal business regulations *Notes:* \_\_\_\_\_

### SECTION 5 — Digital Readiness

- Professional website or verified business social profile *Notes:* \_\_\_\_\_
- Updated logo, branding, and contact information *Notes:* \_\_\_\_\_
- Online reviews or testimonials available *Notes:* \_\_\_\_\_
- Secure cloud storage for critical business files *Notes:* \_\_\_\_\_
- Backup system for accounting and operations data *Notes:* \_\_\_\_\_

### SECTION 6 — Funding Preparation

- Identified funding sources aligned with business goals *Notes:* \_\_\_\_\_
- Clear budget or spending plan for requested funds *Notes:* \_\_\_\_\_
- Drafted, reviewed, and finalized funding narrative *Notes:* \_\_\_\_\_
- Required attachments ready (financials, tax returns, etc.) *Notes:* \_\_\_\_\_
- Deadlines tracked in a funding calendar or spreadsheet *Notes:* \_\_\_\_\_
- One-page business overview or capability statement prepared *Notes:* \_\_\_\_\_

### QUARTERLY READINESS REVIEW

Review Date	Reviewer	Key Updates