



# New Business Checklist

**Initial Applications & Licenses (for New Businesses):**

- |  | To Do | Done  | N/A   |
|--|-------|-------|-------|
| - Create New Business Entity (LLC, Corporation, Partnership) | _____ | _____ | _____ |
| - Obtain Federal Tax Identification Number                   | _____ | _____ | _____ |
| - Obtain State Tax Identification Number                     | _____ | _____ | _____ |
| - Obtain Parish Occupational License                         | _____ | _____ | _____ |
| - Obtain State and Parish Sales Tax Licenses                 | _____ | _____ | _____ |
| - Application to Record Trademark and/or Trade Name          | _____ | _____ | _____ |
| - Open Business Checking Account                             | _____ | _____ | _____ |

***Limited Liability Companies (only):***

- |   |       |       |       |
|---|-------|-------|-------|
| - Election to be taxed as a corporation             | _____ | _____ | _____ |
| - Election for Small Business Taxation – S Election | _____ | _____ | _____ |

***Corporations (only):***

- |  |       |       |       |
|--|-------|-------|-------|
| - Filing of Louisiana Corporate Initial Franchise Return | _____ | _____ | _____ |
| - Sub S Election - Filing 2553 Election with IRS         | _____ | _____ | _____ |

**Insurance:**

- |   |       |       |       |
|---|-------|-------|-------|
| - Health, Dental and/or Disability Insurance                | _____ | _____ | _____ |
| - Officer’s Life Insurance (Key Man Insurance)              | _____ | _____ | _____ |
| - Cafeteria Plans – tax-sheltered health and dependent care | _____ | _____ | _____ |
| - Workers Compensation                                      | _____ | _____ | _____ |
| - Business Liability and/or Business Interruption Insurance | _____ | _____ | _____ |

**Planning for a Successful Business**

- |   |       |       |       |
|---|-------|-------|-------|
| - Creating a Formal Business Plan                   | _____ | _____ | _____ |
| - Creating an Initial Budget and Cash Flow Forecast | _____ | _____ | _____ |

**Internet Business Development:**

- |   |       |       |       |
|---|-------|-------|-------|
| - Website Development - E-Commerce Solutions -Online Shopping Carts | _____ | _____ | _____ |
|---|-------|-------|-------|

**Accounting Software and/or Training:**

- |   |       |       |       |
|---|-------|-------|-------|
| - Acquisition of Accounting Software and/or Accounting Services   | _____ | _____ | _____ |
| - Peachtree or QuickBooks Accounting Training/Seminars  | _____ | _____ | _____ |
| - Interactive Accounting Tutorial on CD-Rom<br><small>(Designed to teach accounting principles and concepts to people who will be involved in the day-to-day bookkeeping for your a business)</small> | _____ | _____ | _____ |

**Payroll, Accounting Assistance and Tax Filing Services**

- |   |       |       |       |
|---|-------|-------|-------|
| - Payroll Preparation & Payroll Tax Report Filing Services                  | _____ | _____ | _____ |
| - Sales Tax Preparation/Filing Services                                     | _____ | _____ | _____ |
| - Bank Account Reconciliations  | _____ | _____ | _____ |
| - Accounting Assistance / General Ledger Review                             | _____ | _____ | _____ |
| - Periodic Financial Statements (A Financial Report Card for Your Business) | _____ | _____ | _____ |
| - Business Consulting Services  | _____ | _____ | _____ |

**Strategic Tax Reduction / Wealth Building:**

- |  |       |       |       |
|--|-------|-------|-------|
| - Investments (Mutual Funds, Annuities, Stocks & Bonds) & Retirement Plans | _____ | _____ | _____ |
|--|-------|-------|-------|

To obtain a quote or more information on any of the above items, please fax this form to (504) 834-8218. Or mail to: The Allday Consulting Group, LLC 2901 N. Causeway Blvd., Suite 301, Metairie, LA 70002 Or, see reverse side for the turn-key solution “**New Business Starter Kit**”

Name \_\_\_\_\_ Phone ( \_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_ Fax ( \_\_\_\_ ) \_\_\_\_\_ - \_\_\_\_\_  
 Company Name \_\_\_\_\_ Date of Corporation or LLC Established \_\_\_\_/\_\_\_\_/\_\_\_\_  
 Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_ Zip \_\_\_\_\_

Other Comments (Needs):

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Computer Checks, Deposit Slips and Envelopes

Quantity	Computer Laser Checks	Double-Window Envelopes Regular	Double-Window Envelopes Self-Seal	Laser Deposit Slips	Shipping
250	70.04	N/A	N/A	63.21	\$11.95
500	90.09	40.01	48.72	80.85	\$16.00
1000	123.38	71.82	86.52	111.30	\$19.95
2000	216.51	141.23	169.05	194.991	\$22.45
3000	252.11	205.17	248.22	227.12	\$24.95

**15% DISCOUNT  
FOR  
FIRST-TIME ORDERS**

\*\*\*\*\*

STANDARD  
DELIVERY TIME IS  
FIVE BUSINESS DAYS  
***AFTER THE PROOF  
IS APPROVED***

\*\*\*\*\*

*Prices Good Through December 31, 2011*

	Qty	Amount
LASER CHECKS (Color _____ Starting Check Number _____)	_____	\$ _____.
<small>(Please attach voided check) (Check Colors: Blue, Brown, Burgundy, Gray, Green, Purple, Red, Yellow)</small>		
DOUBLE-WINDOW ENVELOPES - ___ Regular ___ Seal	_____	\$ _____.
LASER DEPOSIT SLIPS (attach voided deposit slip)	_____	\$ _____.
LOGO CHARGE (BLACK & WHITE - ADD \$25. Logo must be in a camera-ready JPEG or TIF format)	_____	\$ _____.
SUBTOTAL	_____	\$ _____.
15% DISCOUNT – FIRST-TIME ORDERS ONLY	_____	\$(_____.)
SALES TAX (LA STATE + PARISH)	_____	\$ _____.
TOTAL FOR SHIPPING AND HANDLING (Each Item Ships Separate - Compute shipping accordingly)	_____	\$ _____.
Please Specific the Software ___ QuickBooks ___ Peachtree ___ Other (Name): _____		
TOTAL DUE	_____	\$ _____.

Contact Name \_\_\_\_\_ Company Name \_\_\_\_\_  
 Phone Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Fax Number (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
 Shipping Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_  
 Email Address \_\_\_\_\_

Payment Method (Check one)    Check Enclosed \_\_\_\_\_    VISA \_\_\_\_\_    MASTERCARD \_\_\_\_\_    AMEX \_\_\_\_\_

**CREDIT CARD INFORMATION:**

Card Number \_\_\_\_\_ Expiration Date \_\_\_\_/\_\_\_\_  
 Cardholder's Name \_\_\_\_\_  
 CC Billing Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Cardholder's Signature \_\_\_\_\_ CSV Code (on the back) \_\_\_\_\_

**Fax your order to (504) 834 - 8218 or mail it to us at:**

**Allday Consulting Group, LLC  
2901 N. Causeway Blvd., Ste. 301 Metairie, LA 70002**

*QuickBooks and Peachtree Certified Consultants / Resellers / Trainers*

www.AlldayCPA.com - www.QuickBooks-Help.com - www.Peachtree-Support.com

**Baton Rouge 225-928-5183 | Lafayette 337-269-1964 | Mandeville 985-871-4963 | Metairie 504-835-4213  
Luling / Boutte / Houma 985-879-3288 | Slidell 985-871-4963**

# 2011 QuickBooks & Peachtree Classes

## Peachtree® (Eligible for SBET Reimbursement—Advance Approval Required)

Getting Started & Processing	01/27	03/24	05/26	07/28	09/29	11/17
Beyond the Basics & Mastering	01/28	03/25	05/27	07/29	09/30	11/18

## QuickBooks® (Eligible for SBET Reimbursement—Advance Approval Required)

Getting Started & Processing	02/24	04/28	06/23	08/25	10/27	12/08
Beyond the Basics & Mastering	02/25	04/29	06/24	08/26	10/28	12/09

## Payroll — Live (not recorded) Webinars via GoToMeeting (Eligible for SBET Reimbursement—Advance Approval Required)

Mastering Peachtree Payroll	01/14	04/22	07/22	10/21	
Mastering QuickBooks Payroll	02/28	05/20	09/23	11/11	

Payroll Training - Due to limited interest, payroll is no longer taught as part of the "Getting Started & Processing" or "Beyond the Basics & Mastering" classes. Instead, they are taught as a separate, stand alone live webinar. Payroll Webinars are from Noon to 3:30 PM CST.

## FREE TRAINING!

If you're a Louisiana-based company with 50 or fewer employees and have been in business for 3 years, you may be eligible for a 100% reimbursement through the Louisiana Small Business Employee Training Program!

**For more information:**  
Visit [www.LaWorks.net](http://www.LaWorks.net)  
Click on *Incumbent Worker Training*  
In the *Business* Section

Or, call us for details!  
Metairie 835-4213  
Baton Rouge 928-5183  
St. Tammany 871-4963  
Lafayette 269-1964  
Toll Free 800-259-4213

**Important!**  
*Must be Pre-Approved to Qualify for Reimbursement!!*

## Remote & Onsite One-on-One Training Also Available

### REMOTE ATTENDANCE — Can't leave the office? Don't want to travel?

You Can Attend Remotely From Your Home or Office. With a Direct Internet Connection, You'll see the SAME PRESENTATION, Hear the LIVE INSTRUCTOR - . You'll HEAR QUESTIONS RAISED BY OTHER STUDENTS.....AND You'll be able to ASK YOUR OWN QUESTIONS!!

Name of Attendee	Phone Number <small>(If different from company number below)</small>	Email Address <small>(for confirmation purposes)</small>	Date(s) of Attendance	Attendance C = In Class R = Remote	Computer Rental? Y/N	Tuition + Computer Rental

**Tuition: 1-Day \$325 | 2-Days \$575 | Payroll Webinar \$195 | Computer Rental \$75/day**

- Class sizes are limited. Advanced registration and payment are required. A cancellation fee of \$50 is charged if you cancel within 7 days of the scheduled class. There is no charge for rescheduling to a future class date, if done so at least 7 days in advance.
- Computers Are Not Required! Our classes are taught by "CERTIFIED TRAINERS" by demonstrating the most recent version of the software on a wide screen projector. This method of training allows students to focus on the subject being taught, encourages students to ask questions, and allows them to take notes. We are able to cover more material so you receive more education for your investment. If you feel that you would like to have a computer, we encourage...

### Registration Information:

Company Name \_\_\_\_\_ Telephone (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_ Fax (\_\_\_\_) \_\_\_\_\_ - \_\_\_\_\_  
Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
E-mail (For Confirmation Purposes) \_\_\_\_\_

Check Enclosed – Make check payable to "Allday Consulting Group"  
 Visa  MC Name on Card \_\_\_\_\_

Credit Card Number \_\_\_\_\_ Exp. date \_\_\_\_/\_\_\_\_/\_\_\_\_  
Billing Address on Card (if different) \_\_\_\_\_  
Signature of Card Holder \_\_\_\_\_

Fax registration to 504-834-8218 or mail it to us at 2901 N. Causeway Blvd., Suite 301, Metairie, LA 70002  
For more information about all of our services and in-depth course descriptions, visit our websites

## Allday Consulting Group, CPAs (QuickBooks & Peachtree-Certified Trainers)

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