



READY TO TRADE CHECKLIST

This checklist provides you with a place to keep track of what you need to complete when setting up as self-employed. Fill in the details as you go, but remember that not all will be relevant to you. You can add anything else important as well.

NAME:

BUSINESS NAME:

TARGET DATE TO TRADE:

Legal	Date sorted
I will register as a Sole Trader Partnership Limited Company Other	
Insurances I will need to buy • • • • •	
The licenses I will need to apply for • • • • • •	
Anything else I need to do • • • • •	

Financial	Date sorted
My Personal Survival Budget is known £	
I know how much money I need to get started £	
This money is coming from: • • • • • •	
I know what I am charging for the products or services I am offering	
I need a personal bank account	
I need a business bank account	
I have proof of identity	
I have right to work documents	

Resources	Date sorted
I will need a land line number	
I will need a mobile	
I will need an email address	
I will need a website	
My business will be: Home based Mobile Online Shop Other	
I know what I need to buy	
I know where to buy it from	

Customers and marketing	Date sorted
My 30 second pitch is prepared	
My marketing plan is prepared	
My first customers will be • • • •	
I will need to set up social media Twitter Facebook Instagram Linked in Other	
I need printed materials Business Cards Leaflets Posters	

Other things I need to sort	Date sorted

Support	Date sorted
To help me get started I can call on the following to help me • • • • • • •	
I need to apply for benefits while I am getting started	
Any other support needed • • • • • • • • • •	