

new business set-up / quickstart guide

For Therapists | Adapted from How to Become Self-Employed in Seattle with Jenny Girl Friday

EARLY BETA

♥ 1 - First Steps 2 - Next Steps 3 - Within 3 - 6 months ♥

	Legal & Taxes	Numbers	Marketing	Nitty Gritty	Self-Management
1	<ul style="list-style-type: none"> <input type="checkbox"/> Professional License <input type="checkbox"/> PLLC <input type="checkbox"/> EIN <input type="checkbox"/> WA License <input type="checkbox"/> Seattle License <input type="checkbox"/> Professional Insurance 	<ul style="list-style-type: none"> <input type="checkbox"/> Set up Biz Checking <input type="checkbox"/> Set up Tax Savings <input type="checkbox"/> Always transfer ____% <input type="checkbox"/> One Box Method 	<ul style="list-style-type: none"> <input type="checkbox"/> What you do offer? <input type="checkbox"/> Who for? <input type="checkbox"/> First Step / CTA <input type="checkbox"/> Email Signature 	<ul style="list-style-type: none"> <input type="checkbox"/> Services + Pricing <input type="checkbox"/> Work hours <i>Open+closed</i> <input type="checkbox"/> Intake Forms <input type="checkbox"/> Sliding Scale policy <input type="checkbox"/> Invoices / Superbill <input type="checkbox"/> Meeting Legal Reqs*** 	<ul style="list-style-type: none"> <input type="checkbox"/> Create Weekly Schedule <input type="checkbox"/> Assign Office "hours" for biz work <input type="checkbox"/> Min Self-Care needs
2	<ul style="list-style-type: none"> <input type="checkbox"/> Record Biz #s <input type="checkbox"/> Portals - bookmark and record log-in info <input type="checkbox"/> Important Dates <input type="checkbox"/> Assign work times* 	<ul style="list-style-type: none"> <input type="checkbox"/> Number Goggles <input type="checkbox"/> Gross, Expenses, Profit <input type="checkbox"/> Paycheck needs <input type="checkbox"/> Routines for checking in <input type="checkbox"/> Income record <input type="checkbox"/> Expense record 	<ul style="list-style-type: none"> <input type="checkbox"/> Description - Long <input type="checkbox"/> Description - Short <input type="checkbox"/> Digital Presence website or? <input type="checkbox"/> Psych today or? <input type="checkbox"/> Record good feedback 	<ul style="list-style-type: none"> <input type="checkbox"/> Set up payment methods to go to Biz Checking <input type="checkbox"/> Policies - written <input type="checkbox"/> Contracts / agreements <input type="checkbox"/> Additional fees 	<ul style="list-style-type: none"> <input type="checkbox"/> Weekly Check-ins <input type="checkbox"/> Work friends <input type="checkbox"/> How to get help <input type="checkbox"/> Schedule biz chores + projects inside work hours
3	<ul style="list-style-type: none"> <input type="checkbox"/> Reporting Tools <input type="checkbox"/> Your EQ\$ formula <input type="checkbox"/> Know the Essential #s for Reporting 	<ul style="list-style-type: none"> <input type="checkbox"/> Monthly Tracking P and L <input type="checkbox"/> Outsource or in-house? <input type="checkbox"/> Bookkeeping <input type="checkbox"/> Accounting <input type="checkbox"/> Other Savings 	<ul style="list-style-type: none"> <input type="checkbox"/> Referral partners <input type="checkbox"/> Specialty (niche) <input type="checkbox"/> Define Ideal Client <input type="checkbox"/> Collect images, words <input type="checkbox"/> Other services - groups guest speaking? 	<ul style="list-style-type: none"> <input type="checkbox"/> Business insurance <input type="checkbox"/> Tools and supplies 	<ul style="list-style-type: none"> <input type="checkbox"/> No + Maybe Skills <input type="checkbox"/> Thriving Plan <input type="checkbox"/> Annual Calendar <input type="checkbox"/> Plan Vacations <input type="checkbox"/> Self-care - Med/max

**Basic Description

***Any compliance reqs for your industry