

LLC MANAGER

North Carolina LLC Formation Checklist

Fillable worksheet · same steps as techandtinker.com/apps/tinker-llc-manager/start

Not legal, tax, or insurance advice. Confirm fees on sosnc.gov / irs.gov / ncdor.gov.

YOUR IMPORTANT NUMBERS

Legal LLC name

Customer-facing / DBA name (if different)

SOSID (Secretary of State ID)

EIN (XX-XXXXXXX)

Articles filed / submitted date

Articles approved / SOSID date

Registered agent name

Registered agent street address (NC)

Principal office address

SOSNC account email

First annual report due (Apr 15 of year after formation)

FORMATION CHECKLIST

Check each step when done. Notes go on page 2.

01 Gather documents & information

SSN/ITIN, photo ID, street addresses, name ideas, payment for \$125 Articles fee

02 Pick and check your business name

Search SOSNC; optional BE-03 name reservation (\$30 / 120 days, nonrenewable)

03 Gather what SOSNC will ask for

Registered agent (NC street address), principal office, organizer info

04 Create your SOSNC online account

Use a long-term email; file only on sosnc.gov

05 File Articles of Organization (L-01)

\$125 fee · online turnaround about 15–20 business days

06 Apply for your free EIN

IRS.gov only — free · keep CP 575 forever

07 How you'll be taxed and paid

Default: Schedule C + owner's draws (not W-2). Plan estimated taxes if you'll profit.

FORMATION CHECKLIST (continued)

- 08

Create an operating agreement

Not filed with SOSNC — still keep a signed copy
- 09

Open a business bank account

Articles + EIN + ID · do not mix personal and business money
- 10

Register with NCDOR (if needed)

Sales/use, withholding, or other accounts that apply to your work
- 11

Insurance

GL common for contractors · workers' comp if 3+ employees (LLC members not auto-counted)
- 12

Licenses & local rules

GC license often at \$40,000+ project cost · check local permits / zoning
- 13

Know recurring deadlines

LLC annual report due April 15 each year after creation · ~\$200–\$203
- 14

Company name & logo (optional)

Branding can wait until after formation

BANKING, TAX & INSURANCE NUMBERS

Bank name	Account opened date
Account number (last 4 only recommended)	NCDOR account / ID (if any)
General liability policy #	Workers' comp policy # (if any)
Contractor / trade license # (if any)	Insurance agent / broker contact
Tax preparer / CPA (optional)	

KEEP THESE FOREVER

Stamped Articles / SOSID	EIN letter (CP 575)	Signed operating agreement
Annual report receipts	Bank docs & statements	Insurance certificates

NOTES