



Florida Business

Maintenance Checklist

☐ Annual Report Filing

- File the Annual Report with the Florida Department of State.
- Due Date: May 1 each year.
- Information Required:

Business name

Principal office address

Registered agent name and address

Names and addresses of officers, directors, and managers

EIN (Employer Identification Number)

☐ State and Local Business Licenses and Permits

- Renew any state and local business licenses and permits annually or as required.
- Types of licenses and permits may include:

General business license

Professional licenses

Health permits

Zoning permits

☐ Corporate Records Maintenance

- Maintain accurate and updated corporate records.
- Essential documents include:

Articles of incorporation or organization

Bylaws or operating agreement

Minutes of meetings of shareholders, directors, or members

Resolutions and written consents

Stock or membership ledgers

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☐ Registered Agent

- Ensure the registered agent's information is up-to-date.
- Confirm that the registered agent is consistently available during business hours.

☐ Financial Statements and Accounting Records

- Keep accurate and up-to-date accounting records.
- Maintain financial statements such as:
 - Balance sheets
 - Income statements
 - Cash flow statements
- Prepare for any financial audits or reviews.

☐ Tax Filings and Payments

- File state and federal taxes on time.
- Types of taxes include:
 - Corporate income tax
 - Sales and use tax
 - Payroll taxes
- Review and understand the filing requirements and deadlines.
- Ensure timely payment of any owed taxes.
- Record minutes and resolutions.
- Review and discuss business performance, goals, and strategies.

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□ Insurance Policies

- Review and update business insurance policies annually.
- Common types of insurance include:
 - General liability insurance
 - Professional liability insurance
 - Workers' compensation insurance
 - Property insurance
 - Business interruption insurance

□ Employment Compliance

- Ensure compliance with state and federal employment laws.
- Regularly review:
 - Employee handbooks and policies
 - Employment agreements and contracts
 - Employee classifications (exempt vs. non-exempt)
 - Payroll practices
- Maintain records for:
 - Hiring and termination processes
 - Employee evaluations and disciplinary actions
 - Employee benefits and compensation plans

□ Operational Procedures and Policies

- Regularly review and update standard operating procedures.
- Ensure compliance with industry standards and best practices.
- Implement training programs for employees on updated procedures..

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☐ Intellectual Property

- Review and renew any intellectual property registrations:
 - Trademarks
 - Patents
 - Copyrights
- Ensure proper usage and protection of intellectual property.

☐ Contracts and Agreements

- Review and renew business contracts and agreements annually.
- Key contracts to review include:
 - Supplier and vendor agreements
 - Customer contracts
 - Lease agreements
 - Loan and financing agreements
- Ensure all contracts are current and enforceable.

☐ Data Protection and Privacy

- Review data protection and privacy policies.
- Ensure compliance with relevant regulations such as GDPR or CCPA.
- Implement and update cybersecurity measures.
- Regularly back up business data.

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☐ Legal Compliance

- Stay updated on changes in relevant laws and regulations.
- Ensure ongoing compliance with:
 - Corporate laws
 - Employment laws
 - Tax laws
 - Environmental laws
- Consult with legal counsel regularly to address any compliance issues.

☐ Business Continuity and Disaster Recovery

- Develop and maintain a business continuity plan.
- Ensure disaster recovery plans are up-to-date.
- Conduct regular drills and updates to the plan.

☐ Shareholder or Member Meetings

- Hold annual meetings of shareholders or members.
- Record minutes and resolutions.
- Review and discuss business performance, goals, and strategies.

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