



Formalisation readiness checklist

Print this page, tick what you already have, then choose **one** gap to close this week. Registration helps growth — it does not replace records, tax management or licences.

- **NOTE**

Keep this short

Registration gives a formal identity. Ongoing management keeps the business organised.

Readiness scan

Business identity

- **CHECKLIST**

- ☐ Trade name is written down
- ☐ Ownership is clear (who owns / who decides)
- ☐ Quote and invoice details are ready to use

Money and records

- **CHECKLIST**

- ☐ Recent quotes, invoices and receipts are collected
- ☐ Proof of payment is saved for this week
- ☐ Income and spending can be shown for recent work

Customer documents

- **CHECKLIST**

- ☐ Documents clients have asked for are listed
- ☐ Missing documents are named (not just “paperwork”)
- ☐ One folder holds the documents you already have

Rules to check

- **CHECKLIST**

- ☐ Registration / company documents (if needed)
- ☐ Tax questions for SARS or a tax practitioner
- ☐ Licence, permit or industry registration that may apply

Readiness folder inventory

Documents clients or partners have asked for

Document requested	Have it?	Where stored	Still needed

Adviser prep

Write the questions you need answered before you act.

REGISTRATION / COMPANY IDENTITY

TAX (SARS) OR BOOKKEEPING

LICENCES, PERMITS OR INDUSTRY BODY

AUTHORITY OR QUALIFIED ADVISER TO CONTACT

This week's action

FIRST MISSING
ITEM

WHO CAN HELP

TARGET DATE