





PHASE 1 – Business Formation & Legal Setup

1. Choose Your Legal Structure


Recommended: LLC (Limited Liability Company)

-  Protects your personal assets from business liability
-  Easier tax filing than an S-Corp or C-Corp
-  Texas filing fee: ≈ \$300 (one-time)


 **How to file:**

- Go to the **Texas Secretary of State** website → “SOSDirect”
 <https://www.sos.texas.gov/business>
- File **Certificate of Formation – LLC (Form 205)**
- Choose a unique business name: “**HC IT Pros LLC**”
- Add a **Registered Agent** (can be you, or use a service like Northwest / LegalZoom ≈ \$100 / yr)

2. Get Your EIN (Employer Identification Number)

- Go to the **IRS website** → **Apply for EIN** (free, instant online).

<https://www.irs.gov/businesses/small-businesses-self-employed/apply-for-an-employer-identification-number-ein-online>
- You’ll need it for taxes, bank accounts, and vendors.

3. Register for Texas State Tax

- Visit the **Texas Comptroller of Public Accounts** → Sales Tax Permit if you’ll sell taxable hardware/software.
 <https://comptroller.texas.gov/taxes/permit/>

- Service-only IT work is *usually non-taxable*, but check if you resell parts, licenses, or software.

4. Open a Business Bank Account

- Choose a small-business-friendly bank (Chase Business Complete, Novo, BlueVine, or Local Credit Union).
- Bring your EIN, Certificate of Formation, and operating agreement.
- Set up a business debit card and payment app (Stripe, Square, or PayPal Business).



PHASE 2 – Legal & Compliance Documentation

Document	Purpose
Operating Agreement (LLC)	Defines ownership, management, and profit split — even if you're the only member.
Service Agreement / MSA	Outlines your terms, payment, liability, and SLA levels (you already built one!).
Privacy Policy & Terms of Service	Required for your website — protects your business and informs clients.
W-9 Form	Clients will request this for 1099 tax reporting.
Business Insurance	Get a General Liability + Errors & Omissions (E&O) policy — usually ~\$30–\$70 / mo through Hiscox / Next / Thimble.
Local Business License	Check Rockdale / Milam County or your city clerk for any small-business permits (most home-based IT services are exempt).



PHASE 3 – Branding & Online Presence

1. Domain & Email

- Domain: hcritpros.com (GoDaddy, Namecheap ≈ \$15 / yr)

- Email via **Google Workspace** (\$6 / user mo) → you already have this.

2. Website

- You already host on **GitHub Pages** — just link your custom domain.
- Add sections for: About Us | Services | SLA | Contact | Privacy Policy.

3. Google Business Profile

- Register <https://www.google.com/business/>
- Verify your address (PO Box or service area) to appear on Maps.

4. Social Media Presence

- LinkedIn Page (for B2B)
- Facebook Page (for local audience)
- Optional: Instagram or X for branding posts.



PHASE 4 – Finance & Bookkeeping

1. Accounting Setup

- Use **Wave** or **Zoho Books Free** (you already have this).
- Create separate categories for IT services, parts, subcontracting, travel, etc.
- Connect to your business bank account for expense sync.

2. Taxes

- Keep **25–30 %** of profit for federal taxes.
- File quarterly estimated taxes (Form 1040-ES).
- In Texas → no state income tax, but there's a small **Franchise Tax** filing each year (even if \$0 due).

3. Invoicing & Payments

- Use Wave Invoices or Stripe Invoices for online payments.
- Automate recurring invoices for managed clients.



PHASE 5 – Operations & Growth

Area	Tool / Process	Cost	Notes
ITAM	Asset Tiger	Free	Inventory assets per client.
Ticketing	Zoho Desk	Free	3 agents for starter plan.
Remote Access	RustDesk / AnyDesk Lite	Free – Low Cost	Secure remote support.
Accounting	Wave	Free	Tracks income, expenses, taxes.
CRM	HubSpot Free	Free	Track clients and leads.
Password Vault	Bitwarden Teams	\$20 / user yr	Secure credentials.
E-Sign	SignWell	Free	Get signed agreements digitally.
Insurance	Next / Hiscox	~\$40 / mo	Liability & E&O coverage.



90-Day Startup Timeline

Week	Focus	Deliverables
1–2	Legal Formation	File LLC, get EIN, bank account
3	Accounting Setup	Wave + tax tracking + categories
4	Insurance & Contracts	Obtain liability policy + SLA templates
5–6	Branding & Web Launch	Publish site, Google Business, LinkedIn

7–8	Operations Stack	ITAM, Ticketing, CRM, Remote Access
9–12	Client Onboarding & Marketing	Ads, referrals, flyers, local SEO

Optional Next Steps

- Register your **DBA (“Doing Business As”)** name with your county if you plan to operate under any alias (e.g., “HC IT Pros Solutions”).
- Explore **certifications / vendor programs** (e.g., Dell PartnerDirect, Microsoft Cloud Partner).
- Apply for **DUNS Number & SAM.gov** registration if you plan to bid for government contracts.