



THE STARTUP TAX & COMPLIANCE CHECKLIST

Everything venture-backed founders need to stay compliant from **Seed to Series A**.

The Legal Foundation (Do this once)

EIN Confirmation: Ensure you have your IRS CP575 notice saved.	<input type="checkbox"/>
Foreign Qualification: If you are a Delaware C-Corp but work in California/NY, ensure you are registered to do business in your "home" state.	<input type="checkbox"/>
83(b) Elections: (If applicable) Ensure these were filed within 30 days of stock issuance. <i>This is the #1 mistake founders make.</i>	<input type="checkbox"/>

Payroll & Labor (Monthly)

State Tax IDs: Register for withholding and unemployment tax in every state where you have an employee.	<input type="checkbox"/>
Workers' Comp: Ensure your policy covers all active jurisdictions.	<input type="checkbox"/>
Contractor (1099) vs Employee (W2): Review classifications to avoid massive back-tax penalties.	<input type="checkbox"/>

State & Local Taxes (Quarterly)

Sales Tax Nexus: Use a tool (like Anrok or Stripe Tax) to see if your SaaS sales have triggered "Nexus" in new states.	<input type="checkbox"/>
Franchise Tax: Mark your calendar for the Delaware Franchise Tax (Due March 1st) to avoid the \$200+ late fee.	<input type="checkbox"/>

Federal Filing (Annually)

R&D Tax Credit (Form 6765): Claim up to \$500,000 against your payroll taxes if you are developing new software/tech.	<input type="checkbox"/>
Form 1120: Federal Income Tax Return (Even if you are pre-revenue!).	<input type="checkbox"/>
Form 5472: If you have 25% foreign ownership, this is mandatory and carries a \$25,000 penalty for missing it.	

Too much to handle? Let [Valiant](#) take the wheel.