

DBA FILING PREP WORKSHEET

Fictitious Business Name / Trade Name Application Prep

DBA Filing Prep Worksheet

Business and Owner Information

Owner full legal name (sole proprietor) or entity legal name (LLC/corporation): _____

Entity type (sole proprietor, general partnership, LLC, corporation): _____

State of formation (if a registered entity): _____

Owner or entity mailing address: _____

Business physical address (if different): _____

Nature of business / goods or services offered: _____

Proposed DBA Name and Name Search

Proposed DBA / fictitious business name (exactly as it will appear): _____

- Searched the Secretary of State business name database for conflicts
- Searched the county DBA / fictitious name index (if filing at the county level)
- Ran a basic federal trademark search (USPTO) for the proposed name
- Checked domain name and social media handle availability

Backup name choice (if the first choice is unavailable): _____

Where to File

Look up before filling in:

State: files DBA-style name at the Secretary of State? (yes/no): _____

State/County: files DBA at the county clerk or recorder? (yes/no): _____

Exact office name and mailing/online filing address: _____

Filing fee for this office (confirm current amount before paying): _____

Publication Requirement

- Confirmed whether this state/county requires newspaper publication

Publication deadline (days after filing, if applicable): _____

Number of consecutive weeks required to publish (if applicable): _____

Qualifying newspaper name and estimated publication cost: _____

Cost and Renewal Tracker

Government filing fee: _____

Estimated publication cost (if required): _____

Total estimated cost to file: _____

Renewal term (1, 2, or 5 years — confirm with filing office): _____

Renewal due date (calendar this now): _____

After Filing

- Confirmed a new EIN is NOT required for this DBA (only for a new entity)
- Brought the approved DBA certificate to the bank to open/update the business account
- Updated invoices, contracts, and signage to the exact filed DBA name

INSTRUCTIONS FOR USE

Complete this worksheet before you sit down at your state's or county's filing portal. Search the name first, confirm the correct filing office for your state, note the fee and any publication requirement, and calendar the renewal date the same day you file. Keep a copy of the approved DBA certificate with this worksheet.