

CLIENT RESOURCE GUIDE

The following is a collection of links to private and government entities to assist you in:

- Business Planning
- Copyright, Patent, Trademark
- IRS to file for an Employer Identification Number (IRS)
- Licensing, Permitting – California Gold (Local through State)
- LLC's, C-Corp, S-Corp
- Loans
- Marketing
- Mendocino County
 - Cottage Food Industry
 - Fictitious Business Name
 - Restaurant and mobile food licensing
 - ServSafe certification
- Protecting intellectual properties
- State of California
 - Resale License (Seller's Permit, State of California)
 - Contractor's Licensing Board
- Zoom video conferencing

BUSINESS PLANNING

Live Plan business plan: \$20.00 per month subscription rate, includes more than 250 business plan samples; guided tutorials to build your business plan, including financials; logins for Business Advisor to review online; includes industry comparative data and wizard to address financial deficiencies.

[Business Plan Software With Performance Tracking | LivePlan](#)

Centro Business Planning App: “free” biz-plan App, that includes guided tutorials and financials
<http://www.centro-mobile.org/>

SBA articles, blogs, and general assistance in how to write a business plan.

<http://www.sba.gov/category/navigation-structure/starting-managing-business/starting-business/how-write-business-plan>

COPYRIGHT, PATENT, TRADEMARKING

Federal trademark, copyright and patent information and links.

[Choose your business name | U.S. Small Business Administration \(sba.gov\)](#)

[Search for patents | USPTO](#)

<https://calosba.ca.gov/business-learning-center/manage/how-to-get-a-patent-in-california/>

<https://worldwide.espacenet.com/>

How to file for a copyright

[Copyright Registration Step-by-Step 2019 \[DIY Electronic Filing\] - YouTube](#)

How to file for a trademark

<https://www.youtube.com/watch?v=wejORSqthVY>

Trademark or LLC, which comes first

<https://www.youtube.com/watch?v=MpKmaqtSbgw>

IRS

Employer Identification Number (EIN)

<https://sa.www4.irs.gov/modiein/individual/index.jsp>

Even if a Sole Proprietor with no employees, it is recommended you secure an EIN (its free), without it you must use your SSN when identifying yourself to private and government entities in which to conduct business.

LICENSES & PERMITS

(City, County, State, Federal)

<http://www.calgold.ca.gov/>

LLC

Forming/Registering an LLC

[File Online : California Secretary of State](#)

Important, please read:

- *Do not use Legal Zoom or any other online paid legal service. Follow the instruction on the State of California Secretary of State web site, and you will be able to register your LLC in quick order, without paying \$350 plus.*

LOANS

SBA Loan Information

504 vs 7a <https://cdcloans.com/lender/504-7a-loan-comparison/>

SBA 7a <https://www.sba.gov/partners/lenders/7a-loan-program/types-7a-loans>

SBA 504 <https://www.sba.gov/offices/headquarters/ofa/resources/4049>

CDFI's:

Mendocino Economic Development Financial Corporation <http://edfc.org/>

Arcata Economic Development Corporation AEDC www.aedc1.org.

Credit Score assistance (West Center webinars)

[Improving Credit Scores and Cash Flow — West Business Development Center \(westcenter.org\)](#)

[Curing Your Credit — West Business Development Center \(westcenter.org\)](#)

MARKETING

Email marketing services

Mail Chimp

https://mailchimp.com/features/?awid=41511564&awag=31005843062&awad=138073828239&awkw=mailchimp&pid=GAW&source=website&gclid=CM_m0tj4iNQCFQORaQodmQ4C2g&gclsrc=aw.ds&dclid=CO38kNn4iNQCFVc-Twod7RkAFA

Constant Contact

https://www.constantcontact.com/index.jsp?utm_id=G00910401D&cc=G00910401D&pn=search&gclid=CJ3nvYvz8dACFZNffgodxFQPdA&ef_id=WFBKagAAAc7yI9cR:20161213192612:s

Logo development and design

[Fiverr - Freelance Services Marketplace for Businesses](#)

Simon Sinek, The Golden Circle

<https://www.youtube.com/watch?v=i-89IO5M7Lc>

MENDOCINO COUNTY – OFFICES OF ASSISTANCE

FICTITIOUS BUSINESS NAME - (FBN)

FBN Overview and Fees

[Fictitious Business Names | Mendocino County, CA](#)

Instructions/information from Mendocino County

[Microsoft Word - FBN Information.doc \(mendocinocounty.org\)](#)

FBN Form (Mendocino County)

[1 \(mendocinocounty.org\)](#)

FOOD SPECIFIC INDUSTRY BUSINESS OFFICES

COTTAGE FOOD INDUSTRY OVERVIEW

[showpublisheddocument \(mendocinocounty.org\)](#)

COTTAGE FOOD INDUSTRY, REGISTRATION/PERMITTING APPLICATION

[Microsoft Word - CFO Registration-Permitting Form MCEHD 5.2014.docx \(mendocinocounty.org\)](#)

California Food Safety Licensing and Resources

[Food Safety Program \(ca.gov\)](#)

RESTAURANT AND MOBILE FOOD SERVICE LICENSING

[Mendocino County Food Service Licensing Requirements.pdf](#)

MANAGER AND HANDLER SERVSAFE CERTIFICATION (*not part of County of Mendocino*)

[ServSafe® - Food Handler, Manager and Responsible Alcohol Training - Home](#)

<https://www.servsafe.com/ServSafe-Manager>

RESEARCH

Industry wages and salaries, etc.

<https://www.bls.gov/>

<http://glassdoor.com>

NAICS (North American Industry Classification System) Dept. of Labor business statistical information

<http://www.bls.gov/bls/naics.htm> home page

<http://www.naics.com/search> search tool

STATE OF CALIFORNIA LINKS

California DIR (Dept. of Industrial Relations) workplace FAQ's

<http://www.dir.ca.gov/dlse/dlse-faqs.htm>

California Dept. of Fees and Taxes – Resale License/Seller's Permit (same document)

<http://www.cdtfa.ca.gov/formspubs/pub73.pdf>

<http://www.cdtfa.ca.gov/services/permits-licenses.htm>

Important: once you begin your application and need assistance, there is a customer service number. Use it as needed, very helpful and will guide your through the process.

California Food Safety Licensing and Resources

[Food Safety Program \(ca.gov\)](#)

State Contractor's Board, Home

[CSLB-Home -CSLB \(ca.gov\)](#)

STATE CONTRACTOR APPLICANT OVERVIEW

<HTTPS://WWW.CSLB.CA.GOV/CONTRACTORS/APPLICANTS/>

ZOOM VIDEO CONFERENCING

Create a free account to conduct free video conferencing.

https://www.zoom.us/?zcid=1291&creative=85176088081&keyword=%2Bzoom%20download&match_type=b&network=g&device=c&gclid=EAlaIQobChMIgofh_PmQ4AIVAdRkCh1KbAthEAAYASABEgKWr_D_BwE

All information is subject to change due to newest changes in local and State regulatory adherence to all laws and regulations. This information has been provided according to publicly shared links and is offered as additional information and assistance in supporting local interests and entrepreneurs. All references are individual to each agency. No legal partnerships have been made between any referenced entity and advisor. All legal discussions are relied upon via separate and sole entities.

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