

## The LLC and PLLC Registration Checklist for Mental Health and Wellness Professionals

There are many reasons you might want to form a business entity, including liability protection, hiring W2 employees, or electing S Corp status. The exact steps for formation vary by state, but these are the general requirements for registering a Limited Liability Company (LLC) or Professional Limited Liability Company (PLLC) for your practice.

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### If you're a mental health or wellness professional licensed in California

California law does not permit licensed mental health and wellness professionals to operate as an LLC or PLLC. You'll need to form a Professional Corporation (PC) instead. [Learn more](#)

## LLC/PLLC Registration Checklist

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### Choose a business name

Most states offer an online name search so you can confirm your chosen name isn't already taken. Your legal name must be unique and typically end in "LLC" or "PLLC."



2

### Choose a registered agent

Your registered agent receives official correspondence on behalf of your LLC/PLLC. You can serve as your own registered agent in most states.



3

### File formation documents with your Secretary of State

Submit your Articles of Organization to officially establish your LLC/PLLC. Most states allow online filing, and there's typically a filing fee. We generally recommend you work with a lawyer or online incorporation service to help you navigate the nuances and legalities of this process.



4

### Draft an LLC/PLLC operating agreement

An operating agreement is required in 5 (LIST STATES HERE) states and recommended regardless. If you're forming with multiple members, it outlines how important business decisions will be made.



5

### Get an Employer Identification Number (EIN)

An EIN lets you open a business bank account and is required for tax purposes, even if you don't have employees. If you previously obtained an EIN as a sole proprietor, you'll likely need to apply for a new one for your LLC/PLLC.



6

### Maintain your LLC/PLLC annually

Forming your LLC/PLLC is a one-time step, but keeping it active requires ongoing attention. Most states charge an annual report or renewal fee, and your registered agent may charge a yearly fee as well. Some states also require periodic filings to keep your business in good standing. Set a reminder so these don't catch you off guard.



WHAT YOU'LL NEED TO FILE

## Articles of Organization Checklist

When filing your formation documents, you'll typically need the below information. Check with your states' Secretary of State website for your specific requirements.



### The name of your business

The legal name of your company must be unique. It's typically required to end in "LLC/PLLC" or "L.L.C./P.L.L.C."



### Management structure

Member-managed (all participate in decisions) or manager-managed (specific members handle decisions). Names and addresses of initial members are typically required.



### Business purpose

What your practice does to generate income. A general purpose such as "to engage in all lawful business" may be sufficient.



### Organizer

The individual or entity creating the LLC/PLLC. That's you.



### Duration

The lifespan of your LLC/PLLC. Most are set up to exist perpetually, but you can state a specific end date if you prefer.



### Member contributions

Details about the capital each member will contribute to the LLC/PLLC, whether cash, property, or services.



### Registered agent and registered office

Information about the person who will receive legal documents on behalf of your LLC/PLLC, and the address where those documents should be sent.



### Dissolution process

You can outline the process for dissolving your LLC/PLLC if the time comes. This is especially important if you have business partners.



### Principal place of business

Your primary place of operation. This may be your home address if you operate a home-based practice.



### Signatures

Depending on the state, the Articles of Organization may need to be signed by the organizer, a manager, or a member.

## Need help managing your practice finances?

Heard offers bookkeeping, tax filing, and financial tools built for mental health and wellness professionals.

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