

THE PAPER TRAIL CHECKLIST

HOME SERVICES · YOUR COMPANY IN PUBLIC

MR. WILSON

ONE FIX AT A TIME.
YOU KEEP THE KEYS.

Run this once for the company, then once for each name you have traded under. Every line is somewhere a customer or a regulator can already look. The point is to find the places that no longer agree with each other before somebody else does.

READ THIS FIRST — A disagreement between a listing and your filing is a thing to check, not proof that anything is wrong. Public mirrors go stale and are sometimes simply incorrect. Confirm against the issuing source before you change anything or tell anyone.

THE LEGAL RECORD

- ☐ Legal name and entity number as the state holds them
- ☐ Registered agent, and whether that is still the right person
- ☐ Trade names and any name you have operated under since

WHERE YOU APPEAR

- ☐ Search and map listings, including ones nobody remembers creating
- ☐ Review sites and trade directories carrying an older address
- ☐ Profiles made by a previous marketing company

THE PAPER TRAIL

- ☐ One row per place: what it says, what you hold, who can fix it
- ☐ The date each was checked, on the sheet itself
- ☐ A person initialled the sheet before it was filed

THE LICENCE

- ☐ Licence number as printed, against the number on the state's page
- ☐ Name the licence is held in, where it differs from the trading name
- ☐ Expiry or renewal date, written where somebody will see it coming

YOUR OWN PAPER

- ☐ Website footer, estimate template and invoice
- ☐ Truck lettering and yard signage
- ☐ Anything a customer keeps: the version of your name in their hand

CHECKED AND SIGNED BY

DATE

The owner decides which filings to correct and who calls the manufacturer's dealer desk. Nothing is filed with any state, and no listing is edited, by anything but a person.