



## Social Entrepreneur / Wellness Coach Toolkit (Preview)

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## BUSINESS DEVELOPMENT

### □ Step One: Learn about small business

#### Tips:

- Attend low cost workshops at the [SBA Entrepreneur Center](#). The U.S. Small Business Administration delivers loans, loan guarantees, contracts, counseling sessions and other forms of assistance to small businesses.
- File your business with the [CA Secretary of State Office](#).

#### Resources:

- Small Business administration's [listing of workshops](#).
- [Skoll Foundation](#) - one of the leading foundations in the field of social entrepreneurship.
- [CA Secretary of State Office](#): 916-653-3794, ask for division of corporations

- Franchise Tax Board (800) 852-5711

## □ Step Two: Get a business mentor

Tips:

- Register for free business mentoring and low cost training for aspiring and existing business owners at [SCORE](#).

## □ Step Three: Create a business model

Tips:

- checkout a [sample of an effective business plan](#) to gain insight into your own.
- explore the [Business Model You](#) methodology for creating your own business model

Resources:

- [B-corp](#) - resources for b-corporations; connect and find other b-corps in your area
- [Business Model You](#)
- [Business Plan Sample](#)
- [Business Plan Template](#)
- [Organizational Chart \("Org Chart"\) examples](#)

## □ Step Four: Create a financial plan

Resources:

- [The Pollination Project](#) is an organization that makes daily seed grants to inspiring social change-makers who are committed to a world that works for all.
- [EARN](#) is the nation's leading micro-savings provider. Earn provides the tools for working people to learn how to regularly set aside savings.
- [Financial Projections Template](#)
- [Business Planning and Financial statements template gallery](#)
- [United Way of the Bay Area](#) - use the earn it! keep it! save it! program for tax advising
- [Tax Mama](#): Article on "top ten things taxpayers forget to tell their accountants", etc.

## □ Step Five: Get a legal advisor

Resources:

- [Lawyers Committee for Civil Rights](#) - free legal advisors for entrepreneurs
- [Inner City Advisors](#) - pro bono non-profit / small business advising in Oakland
- [Legal Zoom](#) - LegalZoom provides legal solutions to start a business, run a business, file a trademark application, and a variety of other common legal matters for small businesses.
- [Priore Law Group](#) (San Francisco)