

Annual Compliance Tracker

Staying compliant is essential for maintaining your LLC's good standing. Use this tracker to plan, schedule, and document your key annual responsibilities.

1. Annual Report Filing

Due Date: _____

Filing Portal (State Website): _____

Fee Paid: \$_____

Confirmation Number: _____

Notes: _____

2. Business License Renewal

License Type: _____

Renewal Due: _____

Renewal Portal: _____

Amount Paid: \$_____

Notes: _____

3. Operating Agreement Review

Date Reviewed: _____

Any Amendments Made: Yes / No

Summary of Changes (if any): _____

4. IRS / Tax Filings

Federal Tax Filing Due Date: _____

Filed By (Tax Preparer/Yourself): _____

Notes: _____

5. State Franchise Tax / Fees (if applicable)

Due Date: _____

Amount Paid: \$_____

Payment Method: _____

Confirmation Number: _____

6. Business Insurance Policy Check-Up

Policy Provider: _____

Renewal Date: _____

Notes: _____

7. Business Bank Account Reconciliation

Date Reconciled: _____

Account in Good Standing: Yes / No

Notes or Action Items: _____

8. Member/Owner Meeting Log

Date of Meeting: _____

Key Topics Discussed: _____

Any Resolutions Made: _____

9. Miscellaneous Compliance Tasks

Task: _____

Due Date: _____

Completed On: _____

Notes: _____

This tracker is for internal organizational purposes and should be updated annually or as needed. Please consult a licensed professional for legal or tax-related compliance decisions.