

# Practice Name Change: To Do List

## Naming

- Brainstorm a giant list of possible names
- Decide on whether or not to use your location in the name  
Avoid using the location if you want to expand or sell your practice
- Narrow it down to your top 5
- Check to see if social media handles are available  
on the major platforms
- Search for available domain names for your website
- Verify with the Secretary of State that the name is available
- Choose the final new name for your practice

## Legal

- Decide if you will create a new EIN or updating you current EIN  
(Employer Identification Number)
  - Updating your current EIN? Send a letter to the IRS with the name change
  - Set a reminder to check on it every 3 months
- Fill out forms for the Secretary of State for your state
- Update your name change in the meeting minutes (LLC & SCorp)

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## Marketing

- Update existing website or build a new website
- Send an update to your referral sources & email list
- Hold an Open House
- Notify the local Chamber of Commerce
- Write and schedule a press release

## Misc

- Update all signage (inside & outside)
- Create new email addresses for all staff
- Forward emails from old addresses to the new ones
- Update your practice name with your bank (will need letter from IRS)
- Update your practice name with insurance companies (may need letter from IRS)
- Update your practice name with your payroll company (will need letter from IRS)