

June 1, 2023



BUSINESS FORMATION INTAKE QUESTIONNAIRE

Full Legal Name: _____
Last First Maiden

Address: _____

City, State, Zip

Telephone: _____ Email: _____

Social Security Number: _____ DOB: _____

Education/Training: ☐ High School ☐ College ☐ Trade School ☐ Graduate

Emergency Contact: _____
Name Relationship Phone Number

1. Please check next to the type of business entity that you would like to create:

- ☐ Sole Proprietorship
- ☐ Limited Liability Company (LLC)
- ☐ General Partnership
- ☐ Limited Partnership
- ☐ Limited Liability Partnership
- ☐ Not Sure – Would like to discuss at initial consultation

2. Please check next to any issues that are important to you in choosing a business entity:

- ☐ Personal Liability and Asset Protection
- ☐ Simplicity
- ☐ Tax Implications
- ☐ Ability to sell or transfer your interest in the business.

3. Business Name:

1st Choice: _____

2nd Choice: _____

3rd Choice: _____

4. Business Address: _____

5. Telephone: _____

6. Email: _____

7. Primary Purpose of Business: _____

8. What is the desired financial structure of the business? For-Profit Non-Profit

9. Desired effective date of formation: _____

10. Ownership: Please list all investors/owners.

Owner Name	Address	Ownership Interest (%)	Initial Contribution
			\$
			\$
			\$
			\$

11. Do you want there to be any restrictions on transfers or sales of owner's interests?

Yes

No

12. If yes, please describe:

13. Will profits and losses be shared equally amongst owners? Yes No

14. In what state(s) will the business operate? _____

15. Who will serve as the registered agent for the business? _____

16. Will the business use trademarks or logos? If yes, please describe:

17. Will your business require any special licenses (i.e. liquor, gambling, etc.) If yes, please describe: _____

18. Will the business have its own bank account(s)? If yes, please identify the type of account and name of the institution where the accounts will be located (if known).

19. Have you taken out any loans to pay for startup costs? If yes, please describe the nature of the loan and identify the institution that holds the loan.

20. Does the business have an accountant? If yes, please provide name and contact information.

21. Will all owners/members/partners manage the business or will a single member perform this duty?

22. Who will be responsible for signing documents on behalf of the business?

25.

[illegible]
