

BUSINESS INTAKE QUESTIONNAIRE

FOR

Please complete the following questionnaire prior to your initial consultation. Your responses will allow us to make recommendation of methods for carrying out your desires. Please fill out as much of the form as you can and note where your answers are incomplete. Some of the information requested will not apply to you. You may not know the answer to some of the questions, but please indicate where you think more information is available from another source.

How did you hear about us? Google Facebook referred by: _____ other: _____

Administrative Information

Business name: _____

Doing business as: _____

Date formed or filed: _____ State filed: _____

Primary business activity: _____

Business address: _____

Business phone: _____ Business fax: _____

Primary contact, address, and phone numbers: _____

Alternate contact, address, and phone numbers: _____

Other business locations: _____

Accountant: _____ Phone: _____

Insurance agent: _____ Phone: _____

Other business advisor: _____ Phone: _____

Other business advisor: _____ Phone: _____

Other business advisor: _____ Phone: _____

Approximate net worth of the business: _____

Gross receipts for last calendar year: _____

Expected gross receipts for current calendar year: _____

Ownership Information

List of current owners and ownership interest:

Name	Ownership

Business Administration

When was your last business meeting? _____

What is the date of your last written minutes of business meetings? _____

Who regularly updates your business records and files your periodic reports? _____

Current liabilities against business assets:

Legal form of existing business: _____

Corporation / LLC / Partnership / Sole Proprietorship (circle one)

Tax structure of existing business: _____

S Corporation / C Corporation / Partnership / Subchapter K / Disregarded Entity (circle one)

Business Operations

Number of employees, subcontractors, etc.: _____

Who are your key employees? _____

What major contracts do you have in place? _____

Management Structure

Please describe your management structure: _____

Business Documents

Please bring all of the following that you have to the meeting:

- Operating Agreement
- Member Agreements
- Minutes of Manager's meetings for last five years
- Minutes of Member's meetings for last five years
- Managers' Resolutions for the last five years
- Members' Resolutions for the last five years
- Asset list and ownership documents
- Tax returns for last two years
- Most current profit and loss statement or balance sheet
- List of current members, membership interests, and any voting restrictions