BUSINESS INTAKE QUESTIONNAIRE

FOR

_____________________________________________________________________

Please complete the following questionnaire prior to your initial consultation. Your responses will allow us to make recommendations 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:

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<thead>
<tr>
<th>Name</th>
<th>Ownership</th>
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**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