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Corporate Entity Formation Questionnaire
INFORMATION ABOUT OWNERS

Owner #1: _____

If married, spouse name: _____

Address: _____

Phone: _____

E-mail: _____

Ownership interest held: _____ %

Voting interest held (if different): _____ %

Time to be devoted to the business: _____ %

Management function: _____

Salary from business: _____

Taxable year, if different from calendar: _____

Guaranteed minimum return (if any): _____

Family and/or prior business relationship to other participants: _____

Owner #2: _____

If married, spouse name: _____

Address: _____

Phone: _____

E-mail: _____

Ownership interest held: _____ %

Voting interest held (if different): _____ %

Time to be devoted to the business: _____ %

Management function: _____

Salary from business: _____

Taxable year, if different from calendar: _____

Guaranteed minimum return (if any): _____

Family and/or prior business relationship to other participants: _____

Owner #3: _____

If married, spouse name: _____

Address: _____

Phone: _____

E-mail: _____

Ownership interest held: _____ %

Voting interest held (if different): _____ %

Time to be devoted to the business: _____ %

Management function: _____

Salary from business: _____

Taxable year, if different from calendar: _____

Guaranteed minimum return (if any): _____

Family and/or prior business relationship to other participants: _____

Owner #4: _____

If married, spouse name: _____

Address: _____

Phone: _____

E-mail: _____

Ownership interest held: _____ %

Voting interest held (if different): _____ %

Time to be devoted to the business: _____ %

Management function: _____

Salary from business: _____

Taxable year, if different from calendar: _____

Guaranteed minimum return (if any): _____

Family and/or prior business relationship to other participants: _____

Please attach additional sheets if there are more than four owners.

Please answer the following questions related to the structure of your entity. The questions relate to both corporations and limited liability companies. If you feel that a question is not applicable please skip it.

1. Name of corporation/company

First choice: _____

Second choice: _____

Third choice: _____

2. Is entity duration to be perpetual? ("Yes" or "No"?)

If "no," specify number of years: _____

3. Are business purposes to be limited to other than engaging in any lawful business? ("Yes" or "No"?)

a. If yes please describe what limited business purpose: _____

4. Capital structure.

a. Common shares or Units

(1) Number authorized: _____

(2) Without par value. ("Yes" or "No"?) _____

(3) Stated par \$ _____/share.

b. Limitation on rights.

c. Preferred shares. ("Yes" or "No"?) skip if forming an LLC

(1) Number of classes of preferred shares.

(2) Board authorized to fix series. ("Yes" or "No"?)

(3) Class or series.

(a) Number authorized.

(b) Par value \$ _____/share; no par value _____.

(c) Voting rights. ("Yes" or "No"?)

(d) Preference listed in Articles of Incorporation. ("Yes" or "No"?) If "Yes," identify.

(e) Redemption.

- 5. Eliminate cumulative voting. ("Yes" or "No"?) --skip if forming an LLC
- 6. Provide for preemptive rights. ("Yes" or "No"?) --skip if forming an LLC
- 7. Restrictions on transfers
 - a. Included in articles [Yes / No]
 - b. Delegated to directors [Yes / No]
 - c. Description: _____

- 8. Staggered terms for directors. ("Yes" or "No"?) If "Yes": --skip if forming an LLC
 - a. Two groups or three groups?
 - b. Length of term: _____

9. Initial registered agent name: _____

10. Initial registered office address: _____

11. Initial directors --skip if forming an LLC

Please provide Name and contact info

- 1) _____
- 2) _____
- 3) _____

12. Incorporator/Organizer
Name and Address.

13. Delay effective date? ("Yes" or "No"?)
If "Yes," specify date: _____

14. Is a professional license required to perform specific business activities?
If yes please describe: _____

15. Please provide name of CPA firm _____

16. Please provide name of bank _____

17. Capital Contribution

Name	Cash or Asset (Basis & FMV)	Shares/Units