

Corporate Information Sheet

Date: _____

Please fill out the text fields below with the information needed to set up your new corporate entity:

1. What type of entity are you interested in forming? Corporation, S-Corp, Limited Liability Company, Partnership or other (please specify):

2. Name of the corporation or limited liability company: (I will check to see if the name is available with the California Secretary of State.)

a. First choice: _____

b. Second choice: _____

c. Third choice: _____

3. Business address for the company: _____

4. Business telephone number: _____

5. Primary business e-mail address: _____

6. Your name as you want it to appear on the government records:

7. Your personal home address: _____

8. Your Social Security Number (so I can obtain a Federal Identification Number from the IRS for the company): _____

9. How many initial Shareholders will there be? _____

10. Please list the Shareholder(s) names as they want to appear on the stock certificate and their home address. Please advise me if Shareholder has a family trust.

- a. _____
- b. _____
- c. _____
- d. _____

11. How will you and your shareholders be dividing up the corporate shares (equal split, 50/25/25, etc.)

12. Who will be the initial directors of the company?

- a. _____
- b. _____
- c. _____
- d. _____

13. List the officers

- a. President: _____
- b. Vice President (if applicable): _____
- c. Treasurer: _____
- d. Secretary: _____
- e. Other: (please specify) _____

14. A brief description of the company's business:

15. A brief description of any inventions or pending intellectual property of the proposed business:

16. A brief description of the proposed management structure for the business:

17. Please list any potential liabilities associated with the proposed business:

18. How will the capital necessary for formation and operation of the business be obtained? Consider the personal assets of the proposed owners and outside sources of capital, including passive investors and commercial lenders.

19. How will the revenues from the business be distributed among the owners and employees?

20. Is it likely that the venture will require outside financing in the near future?

Yes No

21. Is centralized management of the business desired?

Yes No

22. Is continuity of life desirable?

Yes No

23. Have you considered the administrative complexity and expense associated with each of the organizational forms?

Yes No

24. Will the venture generate tax losses in early years?

Yes No

Whenever you are ready to proceed, please return this completed form together with the executed Retainer Agreement and retainer payment to commence work on the documents for your corporate formation.

I look forward to working with you and will do everything I can to make this process as smooth as possible.

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