LLC FORMATION QUESTIONNAIRE

DATE: _____

COMPANY INFO:

Company Name: **Starting Date:**

Alternate Company Name:

Principal Place of Business: **Primary Phone Number:**

Primary Fax:
Primary Email:

(if different) **Mailing Address:**

Referred By: **Type/Purpose of Business:**

OWNER #1: (MEMBER)

Name (full title): **Percentage of Ownership:**

Address: **Contribution:** $_____

Manager: Yes or No *(please circle one)*

Phone:
Fax:
Cell:
Email:
DOB:
SSN:

OWNER #2: (MEMBER)

Name (full title): **Percentage of Ownership**

Address: **Contribution:** $_____

Manager: Yes or No *(please circle one)*

Phone:
Fax:
Cell:
Email:
DOB:
SSN:

OWNER #3: (MEMBER)

Name (full title): **Percentage of Ownership**

Address: **Contribution:** $_____

Manager: Yes or No *(please circle one)*

Phone:
Fax:
Cell:
Email:
DOB:
SSN:

SS-4 Information→# Employees: _____

Tax Matters Partner: _____SSN: ____-____-____
(TMP MUST BE A MEMBER OF THE COMPANY)

MANAGER: _____ (IF YOU INTEND TO HAVE MGR A NON-MEMBER)

*PLEASE CHOSE **ONE** OF THE FOLLOWING OPTIONS THAT PERTAIN TO YOUR NEW ENTITY:*

***Voting Rights of the Members to Elect a Manager→**[ ] Majority
[ ] Unanimous

***Voting Rights of Members for Removal of Rights→** [ ] Majority
[ ] Unanimous

***Operating Agreement with Buy Sell Provisions→** [ ] Not Necessary
[ ]Yes Necessary

***Election of Managers→**[ ] Annually [ ] Term _____ (yrs.)

[ ] **Buy Sell Agreement**
[ ] **Share Purchase Agreement**
[ ] **Real Estate Specific Company**
[ ] **General Partner of a Limited Partnership**

MISCELLANEOUS NOTES: _____
_____

FOR OFFICE USE ONLY:
(check all that apply)

ACTION NECESSARY:
[ ] **ADD TO STATUS SHEET**

[ ] **$_____ (FEE INCLUDES COSTS)**

[ ] **OPEN AA FILE (WITH REDWELD)**

[ ] **APPLY FOR EIN NUMBER**

TYPE OF ENTITY:
[ ] **MGR-MGD**
[ ] **MEM-MGD**
[ ] **HYBRID**
[ ] **DISREGARDED**

[ ] $_____ **EXTRA FEE FOR**
_____