

New Business Entity Interview Sheet

What type of entity are you planning to operate as (S Corp., C Corp., or LLC)? _____

If LLC, any tax elections to be made? _____

If LLC, single-member or multi-member? _____

Do you have a name for this new business? Yes No If yes, _____

Is this name available with the Secretary of State's office? Yes No

Have Articles been filed with the Secretary of State's office? Yes No

Have you acquired a Federal ID Number? Yes No If yes, _____

If LLC, what type of entity designation for tax purposes _____

Reason for applying _____

What is the nature of the business? _____

Are you planning to have employees? Yes No If yes, how many? _____

Will you be charging sales tax? Yes No

What date will operations begin (**Effective date**)? _____ When will wages first be paid? _____

Legal Name of Entity _____

Physical Address _____

Mailing Address _____

City, State and ZIP Code _____

County _____ Contact Person _____

Phone# _____ Cell# _____ Fax# _____

Registered Agent Name _____ Address _____

Email address _____

Payment info (for MS Secretary of State) Card# _____ Exp _____ Security Code _____

Bank Name _____ Routing# _____ Account# _____

If Corp: Number of Shareholders _____ Number of Directors _____ Number of Officers _____

If LLC: Number of Members _____ Management? _____

Name	Address	City	State	Zip	SSN	Title	%
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Name of principal officer _____ SSN _____

Notes _____

Information needed from client:

Date Started _____

Date Completed _____

