

MHCS FINANCIAL QUESTIONNAIRE

MHCS FINANCIAL was created to assist start up and existing companies to maximize profits and protect assets through proper structuring. To better understand your needs, please respond to the following series of questions:

- 1) What is the current structure of your business?
 - a. C-Corporation
 - b. S-Corporation
 - c. LLC
 - d. Partnership
 - e. New business, need help
- 2) How many companies under your management?
 - a. Only one
 - b. Two
 - c. Multiple companies
 - d. # are LLC's, # are C-corps, # are S-corps
- 3) How many states involved in your operation?
 - a. Local
 - b. Multiple states
 - c. International
- 4) What is the nature of your business?
 - a. Product sales
 - b. Service
 - c. Product and Service
 - d. Manufacturing
 - e. Investment Income
 - f. Real Estate Income
- 5) What tangible assets in operation (circle all that apply)?
 - a. Building
 - b. Equipment
 - c. High dollar Vehicles, Airplanes, Motor Homes, Yacht, etc
 - d. Inventory
 - e. Rental Property
- 6) How many owners/principals in company?
 - a. C-Corp shareholders
 - b. S-Corp Shareholders
 - c. LLC members/owners
 - d. Don't have a company structure yet
- 7) What is estimated gross annual revenue or sales?
 - a. One hundred to two hundred fifty thousand dollars
 - b. Under one million dollar
 - c. One to five million dollars
 - d. Five to twenty million dollars
 - e. Over twenty million dollars

8) What is estimated tax bracket?

- a. _____ 35%
- b. _____ 28%
- c. _____ 15%
- d. _____ 10%

9) What is tax liability (this is the amount paid to IRS)?

- a) _____ \$50,000 - \$199,000
- b) _____ \$200,000 - \$300,000
- c) _____ \$301,000 - \$400,000
- d) _____ \$401,000 - \$1,000,000
- e) Other _____ (enter here)
(Including any upcoming taxable event within next twelve months)

10) Did you use an attorney to determine your business structure?

_____ YES _____ NO

11) Do you have a trust currently? YES _____ NO _____

12) Do you have an active foundation? YES _____ NO _____

13) Do you manage a nonprofit, a 501(c) (3) organization (foundation)?

- a. _____ Yes
- b. _____ No
- c. If YES, is it an
 - i. _____ operating foundation or
 - ii. _____ non operating foundation (grant writing)

Thank you for providing information to better plan a tentative structure for your company.
All information is confidential and will be used for purpose as indicated above.

Please list below the person that referred you:

Your contact information: Name _____

Phone: _____

Email: _____