

Arnold & Arnold, Ltd.

ATTORNEYS AND ADVISORS AT LAW

Business Organization Intake Form

Date Form Completed: _____

- New Client
 Existing Client

Client: _____ SS# _____ Male Female

Have you ever used, or been known by, any other name than that shown above?

- Yes No

If yes, list here each other name, and state when and why each other name was used:

Citizenship: United States Other: _____

Client Address: _____

Home Telephone: _____ May we contact you at this number? Yes No

Cell Phone: _____ May we contact you at this number? Yes No

Email Address: _____

Does this matter involve a business that you hold an ownership interest? Yes No

Or run daily operations? Yes No

If yes to either, please provide the following information:

Business Name: _____

Address: _____

Telephone: _____

Business Organization Type: _____

If matter involves a new business, how will the business be organized?

- Sole Proprietorship Partnership Limited Partnership
 Limited Liability Partnership Limited Liability Company
 Professional Corporation S Corporation C Corporation
 Other: _____
 Unknown

State in which you desire to form the business: _____

Any other states in which you want the company to be qualified to do business:

What is the desired financial structure of the business? For-Profit Non-Profit

Desired effective date of formation of the business: _____

First choice of business name: _____

Second choice of business name: _____

General description of business (i.e. goods, services, profession, etc.):

Address of principal place of business:

List business owners and additional information:

| Business Owner Name | Address | Social Security Number | Amount of Shares/Percentage of Ownership |
|----------------------------|----------------|-------------------------------|---|
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List all officers you wish to elect with their appropriate title (i.e. President, Vice President, Secretary, Assistant Secretary, Treasurer, etc.):

| Business Owner Name | Title |
|---------------------|-------|
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Statutory Agent (individual responsible for accepting process, notice or demand required or permitted by statute to be served upon the business):

Name: _____

Address: _____

Describe your situation, including any relevant dates:

Are there any other parties involved?

Party: _____ Relationship: _____

Party: _____ Relationship: _____

Party: _____ Relationship: _____

Party: _____ Relationship: _____

Do you have any documents that could help explain your situation? Yes No

If yes, please list those documents and their dates:

Are there any other documents you do not have that could be of assistance? Yes No
If yes, please list those documents, their dates and location (if known):

Describe your desired outcome of legal representation:

Have other attorneys worked on this matter? Yes No
If yes, please provide names, addresses and a brief description of their involvement:

How did you learn about Arnold & Arnold, Ltd.?

- Firm Website Friend/Colleague Former Client Bar Referral
 Other: _____