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**CONFIDENTIAL**

**CORPORATE PLANNING QUESTIONNAIRE**

Please provide the following information. If you need more space, please use another sheet. If you are not certain about an answer, leave the space blank, and we will discuss any questions at our initial meeting.

**BUSINESS INFORMATION/DATA**

1. Legal Name of Business: \_\_\_\_\_
2. Trade Name of Business (if any): \_\_\_\_\_
3. Federal EIN of Business: \_\_\_\_\_
4. Phone No(s). for Business: \_\_\_\_\_
5. Website Address For Business: \_\_\_\_\_
6. Email Address(es) for Officers: \_\_\_\_\_
7. Date of Incorporation/Formation: \_\_\_\_\_
8. State of Incorporation/Formation: \_\_\_\_\_
9. Municipal Address and Registered Office Address of Business: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Name(s) and Address(es) of Registered Agent(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

11. Name(s) and Address(es) of Shareholder(s), Member(s), Partner(s): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

12. Organizer(s) and/or Manager(s) of Business: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

13. List names, addresses and ownership percentages of current or proposed Shareholders/Members/Partners in the business.

_____	_____ %	_____	_____ %
_____		_____	
_____		_____	
_____		_____	
_____	_____ %	_____	_____ %
_____		_____	
_____		_____	
_____	_____ %	_____	_____ %
_____		_____	
_____		_____	
_____	_____ %	_____	_____ %
_____		_____	
_____		_____	

14. For Existing Businesses: Please provide copies of applicable Articles of Incorporation or Articles of Organization (along with any amendments), By-Laws, Operating Agreements, Shareholder Agreements, etc.