

MENDENFREIMAN

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BUSINESS REPRESENTATION QUESTIONNAIRE

This form is the first important step in the process of identifying the legal needs of your ongoing business. Please print clearly and take care to answer all of the questions fully. Use the space provided, and if additional space is needed, use the Supplemental Information section at the end of this form for any comments or additional information you would like to provide.

If you are unsure of an answer, please provide us with as much information as you can. We will rely on much of the information provided to us in this form in advising you on your business and related matters.

Please submit the completed information packet, to us a few days before your scheduled appointment. If you cannot submit the packet to us beforehand, please bring it with you to your scheduled appointment.

A. CONTACT INFORMATION FOR KEY PERSON

Full Name: _____ Date of Birth: _____

Social Security Number: _____ Home/Work Phone: _____

Cell Phone: _____ Email: _____

Business Address:

Address: _____ County: _____

City: _____ State: _____ Zip Code: _____

Home Address:

Address: _____ County: _____

City: _____ State: _____ Zip Code: _____

B. GENERAL

Name of business entity: _____

Type of entity (S Corp, Corp, LLC, LLLP, LLP, etc.): _____

Date formed: _____ State of Formation: _____

Type of business: _____

Does the entity conduct business in another state? _____

If so, has the entity been qualified in that state? _____

Employer Identification Number (EIN): _____

C. IDENTIFICATION OF KEY PARTIES

1. Please list the names and desired ownership percentages of the Shareholders, Members or Partners:

Owner / Shareholder	No. of Shares, Units, or % of Ownership	Date of Issue
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

2. If your business entity is a corporation, please list the names of the current Board of Directors:

3. If your business entity is an LLC, please list the names of the current Managers:

4. Please list the names of the current officers (if applicable):

Name	Title
_____	President / CEO
_____	Vice President
_____	Secretary
_____	Treasurer
_____	Other (please specify: _____)

5. If your business entity is an LLP or LLLP, please list the names of the current Partner(s):

D. IMPORTANT DOCUMENTS

Please forward copies of any current organizational documents to our office for review.

1. Where is the official minute book or record book currently located? _____
2. Have the corporate records been kept current? _____
3. Is there an agreement among the owners pertaining to the ownership (such as Buy-Sell Agreement, Shareholders' Agreement, Partnership Agreement, or Operating Agreement)? _____
4. If the entity has an Agreement among the owners that requires a periodic valuation of the business for purposes of a buy-sell arrangement, please state its current estimated value, and the effective date of the last valuation. If a formula valuation is stipulated, please describe. _____

E. IMMEDIATE INTERESTS OR CONCERNS

Please indicate the primary purpose for contacting our firm in detail (pressing issues and/or requested services):

Please list any documents executed by the business entity that are relevant to the issues and/or services identified above. Please provide us with copies of these documents.

F. REFERRAL INFORMATION

Who referred you to our office? _____

Company: _____ Street Address: _____

City: _____ State: _____ Zip Code: _____

Phone Number: _____ Email: _____

G. CERTIFICATION

The undersigned hereby represents to MendenFreiman LLP that the information contained in this questionnaire is accurate and complete, and that the undersigned understands that the law firm will rely on this information. If the information contained herein is inaccurate or incomplete, the recommendations made by MendenFreiman LLP may not be appropriate.

Signature of Client or Client Representative

Date

H. SUPPLEMENTAL INFORMATION

Provide any additional information or details below.

The completed questionnaire can be submitted via email to Candice Wheeler at cwheeler@mendenfreiman.com or faxed to 770.379.1455.