# ElrodHill Logo

*To take the next step in your estate planning needs, please complete the questionnaire below and submit it prior to your consultation appointment.*

|  |  |  |  |
| --- | --- | --- | --- |
|  | **Referred by:** | |  |
| **Individual Information** | |

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **\*\**Only include spouse information if they will be an agent within LLC*** | | | | | | |
| **Name:** |  | | |  | **Spouse:** |  | | | |
| **DOB:** |  | | |  | **DOB:** |  | | | |
| **SSN:** |  | | |  | **SSN:** |  | | | |
| **Address:** |  | | | | | | | | |
| **City:** |  | | |  | **State:** |  | | **Zip:** |  |
| **Phone (H):** | |  | |  | **Phone (C):** | |  | | |
| **Phone (W):** | |  | |  | **Phone (Other)** | |  | | |

|  |  |  |
| --- | --- | --- |
| For confirmations via text message, please list your phone carrier: |  | |
| **PLEASE NOTE:** *Texting is for scheduling purposes only. Legal questions* ***cannot*** *be answered via text message.* | |

**Company Information**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Preferred Name of Company:** | | | |  | | |
| **Second Choice:** | |  | | | | |
| **Third Choice:** | |  | | | | |
| ***Name Available:*** | | ***First Choice*** | | ***Second Choice*** | ***Third Choice*** |

**Registered Agent / Office**

|  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- |
| **Name:** |  | |  | **Name:** |  | |
| **Mailing Address:** | |  |  | **Mailing Address:** | |  |
| **City, ST Zip** | |  |  | **City, ST Zip** | |  |
|  | |  |  |  | |  |
| **Physical Address:** | |  |  | **Physical Address:** | |  |
| **City, ST Zip** | |  |  | **City, ST Zip** | |  |

**rincipal Office**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name:** |  | | |
| **Mailing Address:** | |  | |
| **City, ST Zip** | |  | |
|  | |  | |
| **Physical Address:** | | |  |
| **City, ST Zip** | | |  |

|  |  |  |  |
| --- | --- | --- | --- |
| **Own** | **Lease** | **Assignment of lease** | **Preparation of lease** |

|  |  |
| --- | --- |
| **Name of landlord (*if applicable*):** |  |

**Company Purpose:**

|  |
| --- |
|  |

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| --- | --- | --- | --- |
| **Date Commencing Operations:** |  | | |
| **Are any loans being made to the company?** | | | **Yes** | **No** |

|  |  |
| --- | --- |
| **If yes, please give details:** |  |
|  | |

|  |  |
| --- | --- |
| **Accountant** |  |
| **Insurance Agent** |  |
| **Financial Advisor** |  |

|  |  |  |
| --- | --- | --- |
| **Retirement plan** | **Yes** | **No** |

|  |  |
| --- | --- |
| **If yes, please give details:** |  |
|  | |

|  |  |  |
| --- | --- | --- |
| **Qualifications in other states** | **Yes** |  |
|  | **No** |

|  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Entity Type** | | | | | | | | | | | |
| **Corporation** | | | | |  | | **Limited Liability Company** | | | | |
|  | | **Articles of Incorporation** | | | |  |  | | **Articles of Organization** | |  |
|  | | **Bylaws** | | | |  |  | | **Operating Agreement** | |  |
|  | | **Organizational Minutes** | | | |  |  | | **Organizational Minutes** | |  |
|  | | **Corporate Kit** | | | |  |  | | **Corporate Kit** | |  |
|  | | **S Election** | | | |  |  | | **S Election** | |  |
|  | | **Corporate Shield through** | | | |  |  | | **Corporate Shield through** | |  |
| **Number of authorized shares** | | | | | |  |  | | **Appraisal Required** |  | |
|  |  | | **No Par** | **Par Value** | |  | |  | | | |

|  |  |
| --- | --- |
|  | **Pre-emptive rights** |
|  | **Cumulative voting** |
|  | **Appraisal required** |

|  |  |
| --- | --- |
|  | **Assets to be transferred and FMV – *Please attach a list of assets to be transferred*** |

**Shareholders / Members**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Shares / %:** |  |  | **Shares / %:** |  |
| **Consideration:** |  |  | **Consideration:** |  |
| **Estate Plan:** |  |  | **Estate Plan:** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Shares / %:** |  |  | **Shares / %:** |  |
| **Consideration:** |  |  | **Consideration:** |  |
| **Estate Plan:** |  |  | **Estate Plan:** |  |

**Officers / Managers**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Title:** |  |  | **Title:** |  |
| **Term:** |  |  | **Term:** |  |
| **Salary:** |  |  | **Salary:** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Title:** |  |  | **Title:** |  |
| **Term:** |  |  | **Term:** |  |
| **Salary:** |  |  | **Salary:** |  |

**Directors (Corporations only)**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Term:** |  |  | **Term:** |  |

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| **Name:** |  |  | **Name:** |  |
| **Address:** |  |  | **Address:** |  |
| **City, ST, Zip** |  |  | **City, ST, Zip** |  |
| **Term:** |  |  | **Term:** |  |