

**LLC CREATION DATA COLLECTION SHEET:**

**1. Pick 3 Names for your LLC, in priority order of what you'd like. We will apply for your first option, go to second or third only if first name is taken.**

**All Names MUST end with one of the following:**

LIMITED LIABILITY COMPANY  
LLC  
, LIMITED

**For example:**

XYZ LIMITED LIABILITY COMPANY  
XYZ LLC  
XYZ, LLC  
XYZ ENTERPRISES LIMITED  
XYZ SOLUTIONS, LIMITED

***\*\*all names can include with or without commas\*\****

*DECIDE NOW ON THE EXACTLY DESIRED SPELLING OF NAMES BELOW, YOU WILL NOT BE ABLE TO SIGN CONTRACTS, CASH CHECKS, OR ADVERTISE WITH ANY OTHER VARIATION OF SPELLING OR PUNCTUATION, AT ALL TIMES MUST HAVE THE FULL EXACT LEGAL NAME:*

Option 1 = \_\_\_\_\_  
Option 2 = \_\_\_\_\_  
Option 3 = \_\_\_\_\_

**2. LLC's State of Incorporation = STATE OF \_\_\_\_\_**

- ( ) I want the LLC owner masked from public records for asset protection/confidentiality
- ( ) I do not care about the owner being on public record (*less fees and less time to setup*)

**3. In addition, list all the State/s you will immediately need authority to be doing business in, if any other than state of incorporation = \_\_\_\_\_**

Mail Forwarding Companies Needed for out of state address?    Y / N

Mail fwding company name, address, website, phone =

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**4. Responsible Party** (is personally responsible for all tax *filing requirements only*, but not for owing the tax itself, just in filing and reporting *on time*)

**Responsible Party Full Legal Name** = \_\_\_\_\_

**Responsible Party Full Legal Address/City/ST/Zip** = \_\_\_\_\_

**Responsible Party Tax ID Number** = \_\_\_\_\_

**5. Pick a Registered Agent in the State of Incorporation** (google “(STATE of incorporation) Registered Agent Services”), usually \$100/year, this is the company who will accept all process of service (summons/lawsuits) and forward notice to you

Registered Agent Company Name and Address = \_\_\_\_\_  
\_\_\_\_\_

**6. You need to decide if you are doing a Member-Managed LLC or a Manager-Managed LLC.**  
*GOOGLE and do research on this*

*Member-Managed LLC*

*Manager Managed LLC*

*Who are the members (owners) of your LLC? List below all and the percentages of ownership, and the property given into the LLC (“capital contributions”)*

Name of Member	Capital Contribution	Percent Ownership

*If your Membership (owners) is only 1 party, then it will also be considered a “Sole-Member LLC”, unless the only member is another Trust, Church, Corporation, or Partnership that has more than one owner.*

*My LLC is a sole-member LLC*

*My LLC has more than one owner/member*

**7. Will the LLC expect to have any employee(s)?**

*None at this time*

*Yes, me and only me*

*Yes, #\_\_\_\_ of employees estimated in the first year of operation*

*No, the manager (me) will be an independent contractor, volunteer/not employed*

*Please explain other answer: \_\_\_\_\_*

**8. Check one; you need to decide if you wish your LLC to be Taxed as a:**

- S-Corporation ( )
- C-Corporation ( )
- Sole Proprietorship/Disregarded Entity ( )

*Read more by googling "llc taxed"*

**9. PROPER PLANNING / TAX COMPLIANCE**

*Google, learn the difference between "Accounting" and "Bookkeeping"*

In your own words what is the difference between Bookkeeping and Accounting? \_\_\_\_\_

\_\_\_\_\_

Do you need Accounting Services each year? Y / N

Do you need Bookkeeping Services each year? Y / N

*Google, look up the ideal place to Incorporate your business based on Tax Rates in each State, if this is a concern.*

*Do you need Tax Calculation and Filing Services each year? Y / N*

Do you plan on having any cash receipts or just using your debit card for all purchases?

( ) cash receipts also

( ) no cash receipts expected

Is your LLC owned by a Trust? Y / N

Do you also need help filing taxes for this trust? Y / N

List your budget for accounting/tax filing and accounting per year = \$\_\_\_\_\_

**10. Do you have a Quickbooks License Y / N**

If so list below License ID if you wish to hire for accounting / bookkeeping management;

License ID = \_\_\_\_\_

**11. Do you have a TurboTax License? Y / N**

**12. Do you have a licensed CPA who can file your tax return? Y / N**

List CPA Name/Company/their Contact info here = \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**IF NEEDED:**

**13. Website URL's Desired:**

Option 1 = www. \_\_\_\_\_  
Option 2 = www. \_\_\_\_\_  
Option 3 = www. \_\_\_\_\_

Hosting Needed? Y / N

Website Design/Creation Needed? Y / N

**14. Do you need a walk-through to open a bank account for the LLC? Y / N**

Is the LLC contracting with a non-owner party to be the treasurer/signor on the bank accounts?

Is the LLC authorizing more than one party (if so how many) to be the signors/authorized users on any/all bank accounts, credit cards, etc? = \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**15. Do you need a Merchant Account (to take credit card payments)? Y / N**

What is your expected Monthly Sales Volume ? \$ \_\_\_\_\_/per Month

**16. Explain the company's Mission Statement in 3 sentences = \_\_\_\_\_**  
\_\_\_\_\_  
\_\_\_\_\_

*(do not use slang, we will copy this text exactly into your establishment documents)*

**17. Explain the industry, trade, category = \_\_\_\_\_**  
\_\_\_\_\_  
\_\_\_\_\_

**18. Will you be doing business in any other Country's outside of USA? Y / N If so Explain:**  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_