



## LLC Intake Questionnaire

Estimated Completion Time: 5 minutes

Thank you for choosing **Accuro Corporate Services**! Our process is straightforward- simply complete the order form below! Our team then sends your private payment link and, upon payment, we begin processing your order.

Standard processing time is 7-10 business days.

We look forward to working with you!

- **Team ACS** -

### First, Let's Check To See If Your LLC Name Is Available

Each state requires that LLCs filed within the state have a unique name. Please include the designation LLC, L.L.C. or Limited Liability Company at the end.

**What will the name of your LLC be? \***

### Awesome, Now Tell Us The Home State For {whatWill175}

**Which State is the LLC Being Formed In? The filing fee for each State is displayed below. At Accuro, we believe in transparency and not hiding fees until the last minute. \***

#### New York Publication Requirement (\$400)

New York Law requires LLCs to file notices of publication within 120 days of formation. Notice must be

published in two designated newspapers approved by the appropriate county clerk for six consecutive weeks. After publication, the LLC must obtain an Affidavit of Publication which must then be filed, along with a Certificate of Publication, with the New York Secretary of State. If the certificate of publication, along with affidavits of publication, are not submitted to the State within 120 days, the authority of the LLC to conduct business in the state may be suspended.

Our service includes:

- Preparing legal notices
- Obtaining designated newspapers from the county clerk
- Preparing and submitting requests for publication
- Preparing and submitting publication notices
- Publishing notices in two (2) approved newspapers for six (6) consecutive weeks
- Obtaining an Affidavit of Publication
- Filing an Affidavit of Publication and Certificate of Publication with NY Department of State

\*price includes the state filing fee and the newspapers' publication fee. There is an additional \$175 fee if the LLC was formed in a state other than New York.

### **Would you like us to handle your New York LLC publishing requirement? \***

Yes

No, I will handle this process on my own. I understand that this is a legal requirement and that my LLC is not fully recognized by New York state without satisfying the publication requirement.

## **California Statement of Information (\$110)**

The Statement of Information is a required filing that keeps the state updated with information about participants in the company. Your first statement is due within 90 days of registering with the state. The penalty for a late filing is \$250.

Newly formed or registered companies must file their first Statement of Information within 90 days of first registering their company with the Secretary of State. Thereafter, the annual or biennial due date is the last day of the calendar month in which your entity was registered with the state.

We will make sure your statement is filed timely.

\*\*Cost includes the state filing fee.

### **Would you like us to file your Statement of Information? \***

Yes (\$110)

No, I will handle this process on my own. I understand that not submitting my statement on time may result in a \$250 penalty.

# Congratulations! It looks like {whatWill175} is available.

Enter your contact information below to help reserve it.

## Name \*

First Name

Last Name

## Phone Number \*

Area Code

Phone Number

## Email \*

example@example.com

## LLC Formation Packages

### Which LLC Package would you like? \*

Basic LLC Package (\$85): Preliminary Name Search, Prepare & File Articles of Organization

Start Up LLC Package (\$275): Basic LLC Package + Form Operating Agreement

Small Business LLC Package (\$375) Start-up LLC Package + EIN + Banking Resolutions

Series LLC Package (\$750): Series LLC Formation (DE or TX filings only), includes Preliminary Name Search, Filing Series LLC Articles of Organization, Form Operating Agreement, EIN + Banking Resolutions

### Do you need a Registered Agent? \*

No, I will serve as my own registered agent.

I will have someone else act as my registered agent

Accuro will provide me a registered agent. (\$50 per year)

### Would you like us to file a request for a certified copy of your document? \*

Yes, please obtain a certified copy. (\$85)

No

A registered agent, also known as a resident agent or statutory agent, is a business or individual designated to receive service of process when a business entity is a party in a legal action such as a lawsuit or summons. Registered agents are mandatory in every state.

You can be your own registered agent or have a friend or family member serve as registered agent for free! Alternatively, we can provide a third party agent for you for \$50 annually.

An LLC Operating Agreement is a legal document that outlines the ownership and member duties of your Limited Liability Company. This agreement allows you to set out the financial and working relations among business owners ("members") and between members and managers.

Our attorney-prepared Operating Agreement is designed to be a generic LLC agreement that covers the most common provisions and will work for most businesses. If your business requires industry-specific provisions, has complex ownership arrangements or a large number of members, we recommend consulting an attorney.

Banking Resolutions is a document signed by the "members" of the LLC authorizing a bank to open a bank account in the name of the LLC.

Banking Resolutions are often required to open a business bank account.

Certified Copies are state-issued, exact copies of your original business documents. They typically bear the official seal or the Secretary of State's signature as additional proof of authenticity.

A certified copy of your Articles of Organization may be requested by:

- state governments, if you're applying for a license for your LLC to conduct business in a state other than the state of formation
- lenders, when you're trying to obtain financing
- banks, in order to open a business checking account

\*\*Our price includes the state filing fee.

## **Tell us about the Members...**

\*Ownership % of all Members combined must equal 100%.

**How many members will the LLC have total? \***

# Member 1

Member 1 \*

First Name      Last Name

Percentage of Ownership

What property has this Member contributed?

Address

Street Address

Street Address Line 2

City                      State / Province

Postal / Zip Code

# Member 2

Member 2 \*

First Name      Last Name

**Percentage of Ownership**

**What property has this Member contributed?**

**Address**

Street Address

Street Address Line 2

City                      State / Province

Postal / Zip Code

**Member 3**

**Member 3 \***

First Name      Last Name

**Number**

**What property has this Member contributed?**

**Address**

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

**Member 4**

**Member 4 \***

First Name

Last Name

**Percentage of Ownership**

**What property has this Member contributed?**

**Address**

Street Address

Street Address Line 2

City

State / Province

**Enter Name, Ownership Percentage and Address for each additional Member. \***

Postal / Zip Code

## Registered Agent Information

### Registered Agent \*

First Name

Last Name

### Phone Number \*

Area Code

Phone Number

### Is the Registered Agent Address the Same as Your Principal Business Address? \*

Yes

No

## Management of the LLC

Will your LLC be managed by Members or Managers? An LLC may be managed by its Members, or by a set of Managers, who may or may not also be Members.



**Will the LLC be managed by Members or Managers? \***

Member-Managed

Manager-Managed (Members)

Manager-Managed (Non-Members)

**List the Managers:**

**Just In Case - List Two Alternative LLC Names**

Sometimes an LLC name is taken but it has not been updated in the state's online directory. To make sure this doesn't slow us up, please give two alternative LLC names.

**Alternative Name 1 \***

**Alternative Name 2**

**Primary Business Information**

**Business Email \***

example@example.com

**Principal Business Address \***

Street Address

Street Address Line 2

**Is your mailing address the same as your Principal Business Address? \***

Yes

No

City

State / Province

Postal / Zip Code

## **Now Let's Get Your LLC an Employer Identification Number (EIN)!**

An employer identification number (EIN) is a nine-digit number assigned by the IRS. It's used to identify the tax accounts of employers and certain others who have no employees. The IRS uses the number to identify taxpayers who are required to file various business tax returns. Banks will require an EIN to open a business bank account.

**What is your reason for applying for an EIN? \***

**What date was the business started or acquired?**



Month   Day   Year

**What month does your accounting year end? \***

**What is the principal activity of your business? \***

**What is your specific product or service? \***

**Check all that apply. \***

The business owns a highway motor vehicle weighing 55,000 pounds or more.

- The business involves gambling.
- The business sells or manufacture alcohol, tobacco, or firearms.
- The business pays federal excise taxes.
- The business already has or expects to hire an employee within 12 months, excluding owners.
- None of the above.

**If hiring, what is first date wages or annuities will be paid?**



Month    Day    Year

**If you expect to pay less than \$4,000 in wages over the next calendar year, do you wish to file annual instead of quarterly taxes? \***

**Name \***

First Name    Last Name

**Who is authorized to speak to the IRS on the LLC's behalf? (The "responsible party") \***

First Name    Last Name

**Phone Number of Responsible Party \***

Area Code    Phone Number

**Title in Company \***

ex.: CEO, Managing Member etc

**Social Security Number or ITIN \***

A SSN or ITIN is required to file for and obtain an EIN. This information is NOT kept on file and is NOT shared with third parties. If your LLC is made up of corporate members instead of individuals, then please enter the EIN number of the lead corporate member.

**What address would you like the IRS to mail a physical copy of your EIN statement? \***

Principal Business Address  
Mailing Address

Other Address

**Other Address \***

Street Address

Street Address Line 2

City

State / Province

Postal / Zip Code

## Operating Agreement Terms

Your package includes a Form Operating Agreement. An LLC Operating Agreement governs how the LLC will be managed. The Operating Agreement is an internal document that does not need to be filed with the state.

**How will votes be counted in your LLC? \***

Each Member gets 1 vote

% of Share - Members with most ownership have decision-making authority.

**How often will the LLC make distributions to Members? \***

Monthly

Quarterly

Annually

I don't know

It will not distribute profits

**Will the LLC appoint Officers (i.e.:President, Vice President, Secretary etc.) \***

Yes

No

**How will new Members be admitted? \***

Unanimous Vote

- Simple Majority (51% or more)
- Two-thirds Majority (67% or more)

**How will new Members be removed? \***

- Unanimous Vote
- Simple Majority (51% or more)
- Two-thirds Majority (67% or more)

**If a Member withdraws from the LLC, how many days will the LLC have to buy the withdrawn Member's interest and split it among all Members? \***

ex: 30 days

**How will a withdrawing Member's membership interest be split between remaining Members? \***

- Equally
- Proportionally

**How shall the LLC be dissolved? \***

- Unanimous Vote
- Simple Majority (51% or more)
- Two-thirds Majority (67% or more)

## Legal Permissions

**By checking the box below, you authorize Accuro Corporate Services to execute and submit on your behalf any documents or forms necessary to effectuate the LLC formation contemplated herein. \***

Yes, I Agree

**You understand and agree that you are signing this document electronically and your electronic signature is the legal equivalent of your manual/handwritten signature. By checking this box you authorize Accuro Corporate Services to execute and submit on your behalf any documents or forms necessary to effectuate the entity filing service contemplated herein. \***

Yes, I agree that my electronic signature is as valid as if I signed the document in writing

**By checking the box below I certify that I understand that Accuro Corporate Services is not a law firm or a substitute for an attorney or law firm. Accuro cannot provide any kind of advice, explanation, opinion, or recommendation about possible legal rights, remedies, defenses, options, selection of forms or strategies. \***

Yes, I understand

**By checking the box below, I authorize Accuro Corporate Services to act as a Third Party Designee for the purpose of completing the online Form SS-4 (Application for Employer Identification Number) on my behalf. \***

Yes, I authorize Accuro Corporate Services to complete online Form SS-4 (Application for Employer Identification Number) on my behalf

**By checking the box below, I authorize Accuro Corporate Services to sign a completed Form SS-4 (Application for Employer Identification Number), including the Third Party Designation section, on my behalf prior to completing the online EIN application. \***

Yes, I authorize Accuro Corporate Services to sign a completed Form SS-4 on my behalf

**By checking the box below, I certify that I understand that I am authorizing Accuro Corporate Services to apply for and receive the EIN on my behalf and to answer questions about completion of the SS-4 form. \***

Yes, I understand and agree