

Small Business Formation

Please complete the following for the formation of your small business (LLCs, partnerships and corporations). There are many things to consider such as exit strategies, self-employment taxes, retirement planning, etc. If you haven't done so already, we strongly encourage you to read our KB articles on small businesses including the S-Corp election at-

www.watsoncpagroup.com/kb/19

Business Name

First Choice _____

Second Choice _____

Suffix* (circle one):	LLC	L.L.C.	Limited Liability Co.	PLLC
	Limited	Ltd.	Inc.*	Corp.*

* Only for corporations. An LLC taxed as an S Corp remains an LLC with the Secretary of State. The S election is only a tax treatment.

Business Contact Info

Physical Location _____

Mailing Address _____

Registered Agent* _____

Phone _____ Email _____

* You can be the registered agent provided you live in the same state as the entity. Otherwise you will need a registered agent service to accept mail and service of process. If you need help with this, please let us know. We have access to registered agents in all states.

Ownership Information

Name _____ SSN _____ Ownership% _____

Address _____

City, State, Zip _____

Phone _____ Email _____

Name _____ SSN _____ Ownership% _____

Address _____

City, State, Zip _____

Phone _____ Email _____

Name _____ SSN _____ Ownership% _____

Address _____

City, State, Zip _____

Phone _____ Email _____

Do the owners live in the same state as the business? YES NO SOME

Note- Having more than one owner or member will require a partnership tax return (Form 1065), and all income or losses will be reported on K-1's for each owner's personal tax return. A single owner or member's small business who does not have an S Corp election will only be reported on the individual's personal tax return (Form 1040).

Type of Business

Please describe the general activities and purpose for the business (retail, consultation, etc.):

Do you know the NAICS* or IRS Business Activity Code? If so, what is it? _____

Note- This information can be found at www.naicscod.com if necessary.

Other Filings, Questions

Do you want us to apply for your Federal Employer ID Number (EIN)?*	YES	NO	UNSURE
Do you want us to draft an Operating Agreement (single member LLC only)?	YES	NO	UNSURE
Do you want us to complete and file Form 2553 (S Corp Election)?	YES	NO	UNSURE
Do you currently run payroll or have employees besides you?	YES	NO	

* Banks require your Articles of Formation / Incorporation plus an EIN to open a business banking account.

Owner Signature

Printed Name

Date

Owner Signature

Printed Name

Date

Owner Signature

Printed Name

Date