

Business Planning Worksheet

Hart & David, LLP
Attorneys & Counselors

IF POSSIBLE, PLEASE RETURN THE COMPLETED WORKSHEET TO OUR OFFICE
PRIOR TO YOUR APPOINTMENT VIA MAIL OR FAX.

Business Information

Current or Proposed Business Name _____

Type: To be discussed Limited liability company C Corporation S-Corporation General Partnership
 Limited Partnership/LLP/LLLP Nonprofit Sole proprietorship Other: _____

Formation State: _____

Street Address _____ City _____ State _____ Zip _____

Telephone _____ E-mail Address _____

Reason for Business Planning Inquiry

Important Questions

(Please check "Yes" or "No" for your answer)	Yes	No
Should business activities be limited to specified business purpose, such as provision of professional services? <i>Describe</i> _____		
Does or will this business conduct activities in states other than the state in which it is formed? <i>List</i> _____		
Do you know of any actual or potential litigation against the company or any of its owners? <i>Describe</i> _____		
Do you know of any actual or potential tax, bankruptcy, or administrative proceedings against the company or any of its owners? <i>Describe</i> _____		
Does or will this business have different classes of equity that entitle the owners to different voting or economic rights?		

Other Advisors

Name	Telephone
Current Attorney (if any) _____	_____
Accountant _____	_____
Financial Advisor _____	_____
Life Insurance Agent _____	_____

Party Information

Full Name _____

Type: Individual Business or organization

If individual: Prefer to be called _____ US Citizen? _____ Residence County _____

If business: Business Type _____ Formation State _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____ E-mail Address _____

Role: Owner Manager/Director Officer Other: _____

Full Name _____

Type: Individual Business or organization

If individual: Prefer to be called _____ US Citizen? _____ Residence County _____

If business: Business Type _____ Formation State _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____ E-mail Address _____

Role: Owner Manager/Director Officer Other: _____

Full Name _____

Type: Individual Business or organization

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City _____ State _____ Zip _____

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If business: Business Type _____ Formation State _____

Street Address _____

City _____ State _____ Zip _____

Telephone _____ E-mail Address _____

Role: Owner Manager/Director Officer Other: _____

Party Information (Continued)

Full Name _____

Type: Individual Business or organization

If individual: Prefer to be called _____ US Citizen? _____ Residence County _____

If business: Business Type _____ Formation State _____

Street Address _____

City _____ State _____ Zip _____

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Role: Owner Manager/Director Officer Other: _____

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City _____ State _____ Zip _____

Telephone _____ E-mail Address _____

Role: Owner Manager/Director Officer Other: _____

Discussion Items

Use this section to indicate your areas of concern that you would like to discuss in our consultation:

Description	Check All That Apply
Assistance with selecting the correct form of entity for business liability, personal asset protection, and strategic tax planning purposes.	_____
Preparation or review of entity formation documents, including certificates of incorporation, certificates of rights, preferences and designations, articles of incorporation, bylaws and organizational minutes, shareholder agreements and operating agreements.	_____
Negotiating and drafting buy-sell agreements to address what happens if a co-owner dies or leaves a business, including cross-purchase and entity-purchase agreements or other forms of buy-out agreements.	_____
Negotiation and drafting of asset purchase agreements, stock purchase agreements or other merger and acquisition agreements and ancillary documents.	_____
Executive employment agreements, consulting agreements, stock option plans and stock option awards, equity incentive plans, stock appreciation rights and phantom stock agreements, non-compete agreements, proprietary inventions and non-disclosure agreements, and non-qualified deferred compensation agreements.	_____
Plan for the transfer and survival of a family business.	_____
Software and technology licenses, content licenses, software development agreements, turnkey computer systems installation agreements, web hosting agreements, web development agreements, and application service provider agreements.	_____
Leases and sub-leases of commercial office space.	_____
Protecting personal (non-business) assets from lawsuits or creditors.	_____
Preserving the privacy of affairs in case of disability or at time of death from business competitors, predators, dishonest persons and curiosity seekers.	_____
Preparation of tax opinions or seeking private letter rulings in connection with tax-free reorganizations or other tax-sensitive business structures.	_____
Borrowing and lending documents, including commercial loan agreements, private indebtedness, security agreements, collateral assignments and pledge agreements.	_____
Sales agreements, sales representative and agency agreements, distribution agreements, value-added reseller agreements, incentive compensation plans.	_____
Estate planning, including avoiding or reducing your estate taxes, avoiding probate, or reducing administration costs at time of your death.	_____

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