

## Client interview checklists for incorporation, corporate outfit and EIN

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### Easy instructions for the fillable PDF form

This Adobe PDF form lets you fill in, save, submit (as an email attachment), print, fax, or reuse the form or copies of it. Go to [www.LawyersAidService.com](http://www.LawyersAidService.com) for the most up-to-date version. You **MUST** have Adobe Reader version 8 or later for this document to function correctly.

The checklist features **key questions**. As you answer the key questions (those having a ⇄), other appropriate questions become active for you. Change your key choices, and different questions become active. Inactive questions will have no active blue boxes.

Hover your mouse over most blue selection boxes to view a pop-up with information about that question. The last page of the checklist automatically totals your order to make it easier to mail payment simultaneously.

When finished, hit the 'Submit by email' button on page 5. An email that has been addressed to [maindesk@LawyersAidService.com](mailto:maindesk@LawyersAidService.com) should automatically open in your default email application with this PDF form attached. Hit send. Other options for submitting your order are listed on the last page.

Add your further instructions and overflow text in the box on page 5.

Instructions box:

### Covered in these checklists

#### Corporate formation

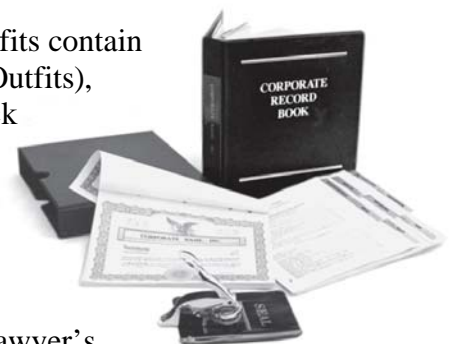
Section A lets you set up a new Texas corporation of any type, have Lawyer's Aid check the name availability, create the Certificate of Formation on archive bond, advance the filing fees, walk it through, and help you resolve any problems on the spot. Turnaround is normally 24 hours or less. For other entities and filings, see our website, or call (888) 474-2112.

#### Professional registered agent service

On question 5 of Section A, you can designate Lawyer's Aid as the company's registered agent. For peace of mind about handling of legal notices, including lawsuits, a professional registered agent service is recommended. If you choose Lawyer's Aid, we'll follow up to get your contact instructions.

#### Corporate Outfit

In Section B you can choose a deluxe or standard Corporate Outfit. Outfits contain embossing seal, minutes, bylaws, 20 share certificates (except in non-profit Outfits), transfer ledger, tax guidance, and extensive forms on archive bond. The black vinyl three-ring binder shows the company name in gold on its spine, and stores a matching slipcase. In the Deluxe Outfit, all text is custom-typed with your information seamlessly filled in. The Standard Outfit comes with fill-in blanks.



#### IRS Employer Identification Number (EIN)

Section C allows you to order an EIN for a corporation or non-profit. Lawyer's Aid deals with the IRS instead of you. You receive the EIN on the SS-4 form usually in 24-48 hours by your choice of email or fax, then mail. Multiple EINs for related entities are discounted.

**A. Corporate formation checklist** (For other entities and filings see our [website](#))

- 8→ 1. Type of entity:  For-profit  Close for-profit  Professional (PC)  Close PC  Nonprofit (NP)
2. Proposed corporate name and two alternatives. Use exact punctuation and spacing. For-profit and close names must include company, corporation, incorporated, limited, or an abbreviation. PC names must include professional corporation or an abbreviation. NPs require no special words.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- 8→ 3. Purpose: (Choose one.)
- For-profit:**  “any lawful purpose” (recommended)  
 Non-standard clause included in instructions box on [page 5](#)
- Professional:**  “the practice of \_\_\_\_\_” (profession)(required)
- Nonprofit:**  IRS 501(c)(3) (recommended)  
 501(c)(3) plus purpose clause attached in instructions box on [page 5](#)  
 “any lawful purpose” not prohibited for NP  
 Purpose clause included in instructions box on [page 5](#)

**For-profit, close, and professional corporations only:**

4. Total shares authorized: \_\_\_\_\_  
 Par value: \_\_\_\_\_

- 8→ 5. a. Registered agent and registered office **street** address: [RA Duties](#)  
[RA Benefits](#)
- Lawyer’s Aid Service, Inc., 408 West 17th, Suite 101, Austin, TX 78701
- Other registered agent and office (PO box addresses allowed only in towns smaller than 5,000):
- b.  The RA has consented to serve. (Required. Free form at [LawyersAidService.com/RA](http://LawyersAidService.com/RA).)
- c.  Also file RA’s signed written consent. (Optional. Attach. Free if submitted with a formation.)

6. Number of initial Directors: \_\_\_\_\_ (at least 3 for nonprofits; at least 1 for all other corporations)

7. Initial Directors’ names and addresses (attach additional pages if needed):

8. Add optional clauses to the Certificate of Formation? (Check all that apply. Call for exact text.):

**Voting clauses:**  Allow preemptive rights  Allow cumulative voting

**IRS related:**  Plan to file for Sub S status  Designated under 1244 stock

**NP only:**  NP has no members  Members control NP

**Close corp:**  Shareholders control corporation

**Other:**  Limit Director liability  Restrict sales to  Limited duration: \_\_\_\_\_ years  
 Buy-sell agreement  35 shareholders  Delayed effective date:

9. Add your custom clause to the Certificate?  No  Yes, text attached in instructions box on [page 5](#)

8→ **A key question** activates other questions appropriate to your choice. (continued)

**B. Corporate Outfit checklist** (Outfits and prices described on [page 4.](#))

→ 10. Type of corporate outfit:

- Deluxe Customized **Fill in 1-20** (items 12-20 may be left blank)  
 Standard **Fill in 1, 2, 4, 8, 10 and 11**

11. **For-profit, close, and professional corporations only:** Share certificates have signature lines for:

- President only  Secretary and President  other:

12. Initial principal place of **business** of the corporation (complete street address is best):

13. Organizational meeting: Date: \_\_\_\_\_ Time: \_\_\_\_\_ City: \_\_\_\_\_

14. Org. meeting: Chair: \_\_\_\_\_ Secretary: \_\_\_\_\_

15. Officers (President and Secretary required for all corporations. **In nonprofits only**, President and Secretary may not be the same person.):

Pres.: \_\_\_\_\_ Sec.: \_\_\_\_\_

VP: \_\_\_\_\_ Treas.: \_\_\_\_\_

Other (name and title): \_\_\_\_\_

**Regular, close, and professional corporations only:**

16. **Per-share** price of shares to be initially issued at organizational meeting: \$ \_\_\_\_\_

Shareholder name	Number of initial shares	Nature and value of payment for shares
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

17. Banking Resolution (optional, but required by many banks):

a. Name and address of bank selected as company depository:

b. Name and title of each person to be authorized to draw on company accounts:

18. Any custom clauses or documents attached?  No  Yes, add to:  Bylaws  Minutes

19. Formation date (if known): \_\_\_\_\_ Filing number (if known): \_\_\_\_\_

20. Blanks (for attorney or client to fill in) to be indicated by:  underlines (default)  spaces

→ A **key question** activates other questions appropriate to your choice.

(continued)

## C. Checklist for IRS Employer Identification Number (EIN)

☐ To register the new corporation with the IRS, a federal requirement, check the box to the left.

Lawyer's Aid Service obtains your EIN, usually the same or the day after the incorporation is done, and reports it to you immediately. You receive Form SS-4 by mail for your records. To order an EIN or EIN checklist for any other kind of business entity, call (888) 474-2112 or see our website.

21. Corporation name (if already known):

22. Mailing address for tax purposes:

23. Street address, if different:

24. Business phone (required):

Business fax (optional):

25. Principal officer's full name as it appears in Social Security records:

Social Security number:

Title:  President  Other:

26. Check this box if you plan to apply for Subchapter S Status (Nonprofits cannot apply)

(You must also file IRS Form 2553 within 75 days. A copy is included in Corporate Outfits.)

27. Closing month of accounting year:

28. Highest number of employees expected in the next 12 months:

Agricultural:

Household:

Other:

29. Earliest date wages may be paid, if any employees are listed above:

30. Do you expect \$4,000 or less in wages in the next full calendar year (Jan. – Dec.)?  Yes  No

31. Type of business or activity (must specify):

32. Specific merchandise sold or services provided:

33. Authorization (required):

A Lawyer's Aid Service representative is authorized as third-party designee to obtain the EIN.

34. Notify me of EIN by:  fax  phone  FedEx  e-mail (Original is mailed with bill.)

Fax/phone number or email:

☛ A **key question** activates other questions appropriate to your choice.

(continued)

## D. Order form, prices, and contact information

Prices *include* state filing fees, sales tax, mailing of Instant Incorporation and EIN, and UPS shipment of Outfit. All prices subject to change without notice.

### 1. To order, select the services and outfit desired:

**Instant Incorporation**

Get the quickest turnaround possible. Lawyer’s Aid checks name availability, drafts and files the Certificate, obtains the Acknowledgment of Filing, phones you with the file number or faxes the Acknowledgment (at your request), and mails it with the file-marked Certificate.

For-profit, close, professional (\$325 state fee). **\$375**

Nonprofit (\$50 state fee)..... **\$100**

**Registered agent service, prorated 1st year:**

When a lawsuit is served, the attorney is called immediately. The citation is emailed, FedExed, faxed, and mailed according to your instructions. (Handling a service of process is \$20, plus a fee for any FedEx.)

Cost: \$10 per *full* month remaining in this calendar year. .... \$\_\_\_\_\_

(Future years are \$120, pre-paid.)

**EIN service**

Lawyer’s Aid secures your IRS EIN and provides you a copy of Form SS-4 ..... **\$50**

**Deluxe Customized Corporate Outfit**

Seamlessly typed documents and forms, with client’s name in every title and footer, and your client’s custom information filled in. Looks most professional, saves your staff hours. Outfit includes deluxe share certificates, embossing seal, minutes, bylaws, forms, binder, slipcase.

For-profit, close or professional..... **\$88**

Nonprofit ..... **\$82**

**Standard Corporate Outfit**

Like Customized Outfit, but with blanks in the preprinted text for your typist to fill in.

For-profit, close or professional..... **\$54**

Nonprofit ..... **\$47**

**Long name on Corporate Outfit**

41+ characters/spaces in company name ... **\$10**

**Rush Outfit the same day (order by 2:00) **\$10****

**Federal Express service:**

Call (888) 474-2112 for options .. **Add \$\_\_\_\_\_**

**2. Total for the above services and outfit selected .....**

**\$**

**3. Send to Lawyer’s Aid Service:**

Use the buttons on page 5 to:

- Submit your order through email to [maindesk@LawyersAidService.com](mailto:maindesk@LawyersAidService.com)
- Print a copy for your records, fax to LAS at (888) 474-4218, or scan and email it to [maindesk@LawyersAidService.com](mailto:maindesk@LawyersAidService.com)
- Save for your records or to finish later
- Clear the form of all data and reset it for new entry

Please mail your payment simultaneously to:

Lawyer’s Aid Service, PO Box 848, Austin, Texas 78767-0848.

**Guarantee**

Unless you are thoroughly satisfied with your Company Outfit, Lawyer’s Aid Service will replace it or send you a full refund.

Attorney’s name: \_\_\_\_\_ Phone: \_\_\_\_\_

Contact name: \_\_\_\_\_ Phone: \_\_\_\_\_

Firm: \_\_\_\_\_ Fax: \_\_\_\_\_

Street: \_\_\_\_\_

Country: \_\_\_\_\_ City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Email: \_\_\_\_\_

Type or sign your name below to confirm you are sending simultaneous payment (required)

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## **E. Your further instructions**

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Use this box to

- Enter any special instructions you have about this order, including overflow text, special clauses, or queries about other services
- Share your comments, complaints, or suggestions. How can we make things better?
- Tell us how to contact you about this order, if you have a preference.
- Let us know how you heard about Lawyer's Aid. An ad? A person?

If, when faxing or mailing in the form, any text overflows the box, please attach it.

### **Instructions box:**