

Client interview checklists for limited partnership formation, binder and EIN

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Easy instructions for the smart PDF checklist

This smart PDF checklist lets you fill in, save, submit (as an email attachment), print, fax, or reuse the form or copies of it. Look on 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 **smart key questions**. As you answer the key questions (those having an *), other appropriate questions become active for you. Change your key choices, and different questions become active. Inactive questions will be greyed-out.

Hover your mouse over any blue selection box 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 the last page. An email should automatically open in your default email application addressed to maindesk@LawyersAidService.com with this PDF attached. Hit send. Other options for submitting your order are listed on the last page.

Comment box

A. Limited partnership formation checklist

(To also register the partnership as a limited liability partnership or for other entities and filings, call (888) 474-2112.)

- 1. Proposed LP name and two alternatives. Use exact punctuation and spacing. LP names must contain limited, limited partnership, or an abbreviation. The name of an LP that will register as a limited liability partnership must also contain limited liability limited partnership, limited liability partnership, or an abbreviation of those.

- * 2. Registered agent and registered office **street** address:

- Lawyer’s Aid Service, Inc., 408 West 17th, Suite 101, Austin, TX 78701 (see [page 3](#) for fees)
- Other registered agent and office (PO box addresses allowed only in towns smaller than 5,000):

- * 3. Principal office address in the United States:

- The registered office address is the principal office address.
- Other:

-
- 4. Name(s) and address(es) of the general partner(s):

-
- 5. Add optional delayed effective date to the Certificate?

LP formation will be effective on _____ / _____ /20 _____ at _____ am/pm

- 6. Add your custom clause to the Certificate? No Yes, text attached in comment box on [page 0](#)

B. Checklist for customized binder, slipcage, and embossing seal

- 7. Would you like a black three-ring binder, slipcage, and embossing seal customized with the limited partnership’s name? (see [page 3](#) for fees)

Binder, slipcage, and seal Binder and slipcage only Embossing seal None

* A **smart key question** that activates other questions for you

(continued)

C. Checklist for IRS Employer Identification Number (EIN)

- * To register the new limited partnership 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 LP formation 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.

8. Limited partnership name (if already known):

9. Mailing address for tax purposes:

10. Street address, if different:

11. Business phone:

Business fax (optional):

12. Name of the general partner:

13. EIN of the general partner:

Lawyer's Aid is to obtain the EIN for the general partner.

The EIN is:

14. Name of the president of the general partnership:

15. Closing month of accounting year:

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

Agricultural:

Household:

Other:

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

18. Do you expect \$4,000 or less in wages this calendar year? Yes No

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

20. Specific merchandise sold or services provided:

21. Authorization (required):

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

22. Notify me of EIN by: fax phone FedEx e-mail

Custom fax/phone number or email:

(Original is mailed with bill.)

* A **smart key question** that activates other questions for you

(continued)

D. Order form, prices, and contact information

Prices *include* state filing fees, sales tax, mailing of Instant LP Formation and EIN, and UPS shipment of binder, slipcase, and seal. All prices may change without notice.

1. To order, select the services desired:

Instant LP Formation

Get the quickest turnaround possible. Lawyer’s Aid Service 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.

Limited Partnership (\$775 state fee) **\$825**

Registered agent service, partial 1st year:

Month of order:

Send \$10 per **full** month remaining in this calendar year. (Future years are \$120, pre-paid.) When a lawsuit is served, the attorney is called immediately. The citation is copied, FedExed, faxed, or mailed according to your instructions. (Handling a service of process is \$20, plus a fee for any fax or FedEx.)

EIN service

Lawyer’s Aid completes Form SS-4 and gets your IRS EIN directly after formation.

One EIN for a business entity **\$50**

Two EINs for related business entities..... **\$65**

Customized binder, slipcase, and seal

Professionally organize your important limited partnership documents with a customized three-ring binder, slipcase, and embossing seal (satisfaction guaranteed).

Binder, slipcase, and seal **\$37.50**

Binder and slipcase only **\$16.50**

Embossing seal only **\$22**

Long name on embossing seal

41+ characters/spaces in partnership name **\$10**

Rush binder same day (order by 2:00)..... **\$10**

Federal Express service:

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

2. Total the above services and items selected.....

\$

3. Send to Lawyer’s Aid Service:

Use the buttons below to:

- Submit your order through email to maindesk@LawyersAidService.com
- Print a copy for your records, fax to LAS at (888) 474-4218, or scan and email it to [maindesk@LawyersAidService.coms](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 binder or seal, 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: _____

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