

Client interview checklist for an LLC company outfit

Instructions

This Adobe PDF form for ordering an LLC kit (also called outfit) lets you fill in the form onscreen or print it and fill it out by hand. You can submit the form to Lawyer's Aid by email, by printing and faxing, or by phone. The form can be saved on your computer, copied, and reused.

The electronic version of the checklist features **key questions**. Answering key questions (those with a →) makes other appropriate questions become active for you and shows active blue boxes.

Each LLC kit contains a company agreement, minutes, embossing seal, 20 membership interest certificates, transfer ledger, tax guidance, and extensive forms on archive bond paper. The black vinyl three-ring binder shows the company name in gold on its spine, and stores a matching dust-proof slipcase. In the Deluxe Kit (**for attorneys only**), all text is custom-typed with your information seamlessly filled in. The Standard Kit comes with blanks to fill in.

A. Checklist for LLC company kit

- 1. Type of company outfit:
- Deluxe Custom (for attorneys only): **Fill in all items.** (Items 6-17 may be left blank.)
- Standard: **Fill in items 1-5 only.** (Defaults used for 16 and 17.)
-
2. Company name. Use exact punctuation, capitalization, and spacing.
- _____
-
3. The company will be governed by its: Members Managers
-
4. Add optional special clauses to the interest certificates? (Check any that apply. Call for exact text.)
- Designated under 1244 stock Buy-sell agreement Other (custom language attached)
-
5. Membership interest certificates:
- Number of signature lines on the membership interest certificates (4 is maximum): _____
- Please specify the title for each signature line (e.g. Secretary, President, Member, or Manager):
- _____
-
6. Purpose (professional LLCs only): "for the practice of _____"
-
7. Registered agent and registered office street address:
- Registered agent: _____
- Registered office street address: _____
- Registered office city: _____ State: TX Zip code: _____
-
8. Initial governing person(s)
- Number of initial members or managers, whichever will govern (1 is minimum): _____
- Names (use Instructions on [page 2](#) for overflow):
- _____
-
9. Initial principal place of business of the LLC (complete street address is best):
- _____
-

10. Organizational meeting: Date: _____ Time: _____ City: _____

Chair: _____ Secretary: _____

11. Officers:

Pres.: _____ Sec.: _____

VP: _____ Treas.: _____

Other (name and title): _____

12. Initial members and the units of membership interest issued to each at the organizational meeting:

Member name and mailing address	Number of units	Nature and value of contribution

13. 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: _____

14. Any custom clauses attached (\$15 fee)? No Yes, add to: Agreement Minutes

15. Formation date (if known): _____ Filing number (if known): _____

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

17. Options:	Statutory defaults	Add'l Options for a Deluxe Outfit
a. One vote per:	<input type="checkbox"/> Member	<input type="checkbox"/> Unit of membership interest
b. Votes to amend the LLC's agreement:	<input type="checkbox"/> ALL	<input type="checkbox"/> a majority <input type="checkbox"/> 2/3 <input type="checkbox"/> 3/4
c. Votes to admit new members:	<input type="checkbox"/> ALL	<input type="checkbox"/> a majority <input type="checkbox"/> 2/3 <input type="checkbox"/> 3/4
d. Votes to admit assignees as members:	<input type="checkbox"/> ALL	<input type="checkbox"/> a majority <input type="checkbox"/> 2/3 <input type="checkbox"/> 3/4
e. Profit, loss, distributions allocated by:	<input type="checkbox"/> Agreed value of contribution	<input type="checkbox"/> Units of membership interest

B. Your further instructions, if any:

C. Order form, prices, and contact information

Prices *include* all sales tax and mail/shipping costs. Prices may change without notice.

1. To order, select the outfit and add-ons desired:

- Deluxe Customized LLC Outfit**
Seamlessly typed documents and forms customized with your company name in every title and footer. We fill in the company agreement and organizational meeting minutes with your custom information. Outfit includes company agreement, 20 deluxe certificates, interest transfer ledger, embossing seal, minutes, forms, binder and slipcase.
Customized Outfit for LLC or PLLC **\$98**
- Standard LLC Outfit**
Like Customized Outfit, but with blanks in the preprinted text for you to fill in.
Standard Outfit for LLC or PLLC **\$64**
- Custom clause on LLC Outfit**
Custom clause text or documents attached or entered into Section B on [page 2](#) **\$15**
- Long name on LLC Outfit**
40+ characters in company name **\$10**
- Residential address shipping fee**
UPS surcharge applied when delivering LLC Outfit to residential areas **\$10**
- Federal Express service:**
Call (888) 474-2112 for options... **Add \$ _____**

2. Total for the above outfit and add-ons selected \$

3. Submit to Lawyer’s Aid Service:

Email to maindesk@LawyersAidService.com **Print and fax** to (888) 474-4218 **Call** (888) 474-2112 to place your order

4. Submit simultaneous payment:

By credit card via online portal: www.LawyersAidService.com/Payment **Or mail 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 name: _____ Fax: _____

Street address: _____

City: _____ State: _____ Zip: _____ Country: _____

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