

Client interview checklists for limited partnership formation, binder and EIN

Instructions	page 0
A. Limited partnership formation checklist.....	page 1
B. Checklist for customized binder, slipcase, and embossing seal.....	page 1
C. LP checklist for IRS Employer Identification Number (EIN)	page 2
D. Order form, prices, and contact information	page 3
E. Your further instructions.....	page 4

Easy instructions for the fillable PDF form

This Adobe PDF form lets you electronically fill in the form to print out, reuse, or attach to an email for submission. Visit 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. Download it [here](#).

The electronic version of 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.

If filling out electronically, hover your mouse over many 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, you can submit your order form by mail, by printing and faxing, or by email. There is also a “Clear form” button on the last page.

Add your further instructions and overflow text in the box on [page 4](#).

Instructions box:

Covered in these checklists

Limited partnership formation

Section A lets you set up a new Texas limited partnership, have Lawyer’s Aid check the name availability, create the Certificate of Formation on archive bond, advance the filing fees and submit filing to the State, and help you resolve any problems on the spot. For other entities and filings, see our website, or call (888) 474-2112.

Professional registered agent service

On question 2 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.

Customized binder, slipcase, and embossing seal

In Section B, you can choose to order a customized binder and slipcase, an embossing seal with the limited partnership’s name, or both. The black vinyl three-ring binder shows the company name in gold on its spine, and stores in a matching slipcase.

IRS Employer Identification Number (EIN)

Section C allows you to order an EIN for a limited partnership and explains how to get an EIN for the general partner also. Lawyer’s Aid deals with the IRS instead of you to get the federal tax ID. You receive the EIN on the SS-4 form usually in 24-48 hours by your choice of email or fax, then by mail. If the Responsible Party does not have a Social Security Number (SSN) or an Individual Taxpayer ID Number (ITIN), acquisition of the EIN will likely take 2+ weeks.

A. Limited partnership formation checklist

- 1. Proposed LP name and two alternatives. 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 partnership, or an abbreviation. **Use exact punctuation and spacing.**

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

Lawyer’s Aid Service, Inc., 505 West 15th, Austin, TX 78701 RA Benefits

Other registered agent (*PO box not allowed. If rural, street description plus PO box is allowed.*):

Registered Agent name: _____

Street address: _____

City: _____ State: _____ Zip code: _____

b. The RA has consented to serve. (required)

c. Also file RA’s signed written consent. (*optional free form at LawyersAidService.com/RA*)

- 3. Principal office address in the United States:

Same as the Registered Office address (above). Other:

- 4. Initial mailing address (*out-of-state address or PO box allowed*):

Same as Principal Office address (above). Other:

- 5. Name(s) and complete address(es) of the General Partner(s):

- 6. What turnaround time and format?

Fastest: form-style filing, in 1-3 business days

Looks most professional: classic legal-document style, in 2-4 business days

- 7. *Optional*: Delayed effective date: _____ at _____.

- 8. Add your custom clause to the Certificate? No Yes, text attached in instruction box on [page 4](#)

B. Customized Binder, Slipcase, and Seal checklist

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

Binder, slipcase, and seal Binder and slipcase only Embossing seal only None

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

(continued)

C. Checklist for IRS Employer Identification Number (EIN)

☞ To register the new LP with the IRS, a federal requirement, check the box to the left.

All fields are required.

Lawyer's Aid Service obtains your EIN, usually the same day or the day after the LP is formed, and reports it to you immediately. You receive Form SS-4 by mail for your records. If the named Responsible Party does not have a Social Security Number (SSN) or an Individual Taxpayer ID Number (ITIN), acquisition of the EIN will likely take 2+ weeks.

To order an EIN for any other kind of business entity, call (888) 474-2112 or go to [our website](#).

10. Limited partnership name (*if already known*):

11. Street address for tax purposes:

12. Mailing address, if different:

13. Responsible party:

Full name: _____ (*as it appears in Social Security records*)

Social Security Number (*or ITIN*): _____ Does not have SSN/ITIN (\$30 fee)

Title: President Other: _____

14. Closing month of accounting year: December (*recommended*) other:

15. Fill in this box only if there will be employees in the next 12 months:

Highest number of employees expected in next 12 months:

Agricultural: _____ Household: _____ Other: _____

Earliest date wages may be paid: _____

Do you expect to pay \$5,000 or less in wages next calendar year (Jan. – Dec.)? Yes No

16. Type of business or activity (e.g. healthcare, construction, transportation, food service, real estate, retail, etc.):

17. Specific merchandise sold or produced, or services provided:

18. Business phone: _____

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

20. Notify me of EIN by: fax phone e-mail (Original SS-4 is mailed with bill.)

Fax, phone, or email address: _____

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

(continued)

D. Order form, prices, and contact information

Prices *include* state filing fees, expedite fee, sales tax, and standard mail/shipping costs. All prices may change without notice.

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

LP Formation

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

Limited Partnership\$825

Registered agent service, prorated 1st year:

When a lawsuit is served, the attorney is called immediately. The citation is sent to you via email, FedEx, or fax, according to your instructions, and then mailed as well.

Cost: \$10 per month left in this calendar year.

Future years are \$120 \$ _____

EIN service

Lawyer’s Aid obtains your IRS EIN and provides you with a copy of form SS-4

Responsible Party has SSN/ITIN \$50

Resp. Party has no SSN or ITIN..... \$80

Customized binder, slipcase, and seal

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

Binder, slipcase, and seal \$45

Binder and slipcase only \$20

Embossing seal only \$27

Long name on Embossing Seal

40+ characters/spaces in LP name..... \$10

Residential address shipping fee

UPS surcharge applied when delivering Outfit to residential areas..... \$10

Federal Express service:

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

2. Total the above services and items 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: 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 name: _____ Fax: _____

Street address: _____

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

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

E. Your further instructions

Please 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 emailing, faxing, or mailing in the form, any text overflows the box, please attach it.

Instructions box: