

Set Free Tax & Professional Services

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LLC/CORPORATION INTAKE SHEET

Full Name _____ DOB _____ SSN _____

Address _____

Email Address _____ Phone _____

Name of your Business _____

Address of the Business _____

Agent of Process (person who will receive court docs in the case the case of legal action-Can be a family member or friend in California)

Name _____

Address _____

Phone _____

Mission Statement or Purpose _____

*Secretary of State LLC takes 2-4 weeks depending on the Secretary of State workload. The filing fee due to the Secretary of State Varies by State is \$70

I acknowledge and agree to Set Free Tax & Professional Services assisting me and my organization in setting up its structure and allow communication with the IRS, State, and other governing organizations. I understand that at least half down for the preparation of documents is due today and the other half once documents are completed.

Signature

Date

Office Use _____

Documents

- Bylaws**
- Fictitious Business Name**
- EIN**

Payment(s)

Notes