

INCORPORATION INTERVIEW FORM

Client Contact Information

Name _____ Home Phone _____
Address _____ Cell Phone _____
City/State/Zip _____ Email _____
County _____ DOB _____
Soc. Sec. No. _____

Employer Contact Information

Employer _____ Office Phone _____
Address _____ Fax _____
City/State/Zip _____ Email _____

INTERVIEW QUESTIONS

1. Name requested for corporation _____
2. Does client request name be formally reserved? YES____ NO____
3. Is corporation to be formed as an Illinois corporation? YES____ NO____
 If NO, what State to be used _____
4. If this is a foreign corporation, is it to be registered to do business in Illinois? YES____ NO____
5. Is corporation to be qualified to do business in states other than Illinois? YES____ NO____
6. Corporation will operate on: Calendar Year____ Fiscal Year____
 If Fiscal Year, give date: _____
7. Purpose of Corporation _____
8. Date on which corporate existence is desired: _____

9. Date on which first business transaction by corporation is to take place_____

10. Is Employer ID Number to be applied for? YES____ NO____

If YES, who is filing the application? ATTORNEY____ CPA____ OTHER____

Give name and address of person filing for Employer ID Number:

11. Address tax documents should be sent to on application for Employer ID Number:

12. Initial capital amount: \$_____

13. Does client want to use minimal capital amount? YES____ NO____

Additional to be added later? YES____ NO____

14. Type of stock to be issued:

Common____ Preferred____ Common with par____ Common with no par____

15. Number of Authorized Shares_____

16. Number of shares proposed to be issued and consideration_____

17. Name and address of incorporate(s)_____

18. Name and address of registered agent_____

19. Name and address of principal office_____

20. County in which principal office is located, and where corporate articles will be recorded:

21. Is corporation to file for S-corporation status? YES____ NO____

If YES, date on which filing is to be done_____

If YES, Soc. Sec. Nos. or ID Nos. of stockholders_____

22. If S-corporation is to be filed, who is to file S-corporation documents?

ATTORNEY____ CPA____ OTHER____

Give name and address of person filing S-corporation documents:

23. Date of first meeting of shareholders_____

24. Date of first meeting of directors_____

25. How many members on initial Board of Directors_____

26. Names and addresses of initial Board of Directors:

27. Names and addresses of initial officers:

President_____

VP_____

Secretary_____

Treasurer_____

Other_____

28. Initial Stock to be issued as follows:

Stockholder's Name	No of Shares	Date Issued
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

29. Is a Section 351 Tax-Free Incorporation to be undertaken? YES ___ NO ___

If YES, who will provide list of assets? _____

30. Date by which list of assets will be provided: _____

31. Is a Section 1244 Stock Plan to be undertaken? YES ___ NO ___

32. Will the corporation use a specific bank? YES ___ NO ___

If yes, the name and address of bank _____

Will bank provide a banking resolution? YES ___ NO ___

33. Which corporate officers are allowed to sign banking documents? _____

34. Will corporation use a specific accountant? YES ___ NO ___

If YES, the name and address of accountant _____

35. Will medical insurance coverage be provided for corp. officers and employees? YES ___ NO ___

36. Date of annual meetings _____

37. Location of annual meetings _____

COMMENTS
