

BUSINESS INTAKE FORM

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Date	
Referred By	

CLIENT	
Client Name	
Client Address	
Business Type	<input type="checkbox"/> Corporation <input type="checkbox"/> LLC <input type="checkbox"/> Partnership <input type="checkbox"/> Sole Proprietor
Contact Name	
Title	
Email - Personal	
Email - Work	
Phone - Cell	
Phone - Home	
Phone - Work	
Phone - Fax	
Address - Home	
Address - Work	

LEGAL MATTER	
Matter Type	<input type="checkbox"/> Formation of Business <input type="checkbox"/> Employment Agreement <input type="checkbox"/> Confidentiality Agreement <input type="checkbox"/> Nondisclosure Agreement <input type="checkbox"/> Noncompete Agreement <input type="checkbox"/> Independent Contractor Agreement <input type="checkbox"/> Agency Agreement <input type="checkbox"/> Distribution Agreement <input type="checkbox"/> Brokerage Agreement <input type="checkbox"/> License Agreement <input type="checkbox"/> Construction Contract <input type="checkbox"/> Sale of Business Agreement <input type="checkbox"/> Sale of Goods or Services Agreement <input type="checkbox"/> Customer Agreement <input type="checkbox"/> Buy-Sell Agreement <input type="checkbox"/> Indemnification Agreement <input type="checkbox"/> Settlement Agreement <input type="checkbox"/> Dispute <input type="checkbox"/> Other: _____
Client is the	<input type="checkbox"/> Entity (the corporation, LLC, or partnership) <input type="checkbox"/> Employer <input type="checkbox"/> Employee <input type="checkbox"/> Contractor <input type="checkbox"/> Owner <input type="checkbox"/> Principal <input type="checkbox"/> Agent <input type="checkbox"/> Seller <input type="checkbox"/> Buyer <input type="checkbox"/> Other: _____
Other Information	

OTHER PARTY #1	
Name	
Address	
Attorney (if any)	
Other Information	

OTHER PARTY #2	
Name	
Address	
Attorney (if any)	
Other Information	

OTHER PARTY #3	
Name	
Address	
Attorney (if any)	
Other Information	

INFORMATION NEEDED TO FORM BUSINESS	
Name of Business	
Alternate Name of Business	
Fictitious Name	
Principal Address	
Specific Purpose	
Owners (Members, Shareholders, Partners) and Number of Shares or Percentage Ownership	
Managers or Directors	
Officers and Key Employees	
Registered Agent Name and Address	
Incorporator Name and Address	
Bank	
Accountants, Insurance Agents, and Other Advisors	
Other	

EXISTING DOCUMENTS ATTACHED	
Draft or Signed Contracts, Articles, Tax Returns, Etc.	
Other	

2025.07.27