

BUSINESS QUESTIONNAIRE

Law Office of
James W. Martin, P.A.
Attorney at Law
St. Petersburg, Florida 33705
www.jamesmartinpa.com
Email jim@jamesmartinpa.com
Phone (727) 821-0904

Date	
Referred By	

CLIENT	
Client Name	
Client Address	
Business Type	☐ Corporation ☐ LLC ☐ Partnership ☐ 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	☐ Formation of Business ☐ Employment Agreement ☐ Confidentiality Agreement ☐ Nondisclosure Agreement ☐ Noncompete Agreement ☐ Independent Contractor Agreement ☐ Agency Agreement ☐ Distribution Agreement ☐ Brokerage Agreement ☐ License Agreement ☐ Construction Contract ☐ Sale of Business Agreement ☐ Sale of Goods or Services Agreement ☐ Customer Agreement ☐ Buy-Sell Agreement ☐ Indemnification Agreement ☐ Settlement Agreement ☐ Dispute ☐ Other: _____
Client is the	☐ Entity (the corporation, LLC, or partnership) ☐ Employer ☐ Employee ☐ Contractor ☐ Owner ☐ Principal ☐ Agent ☐ Seller ☐ Buyer ☐ 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	

2025.07.29