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## POTENTIAL NEW CLIENT WORKSHEET

Business Entity Formation  
Services starting at \$1000 (all fees included)

Dear Potential New Client,

Please fill out this worksheet and submit it to our firm via email at [Roxana@ScottRayLaw.com](mailto:Roxana@ScottRayLaw.com). If the requested information is unknown state "Unknown." If information does not apply "N/A." Should you have any questions regarding how to complete this form or submit it to our firm, please feel free to contact Roxana La Rosa, at (903) 269-3614.

We aim to meet your goals with respect to your new or current business, and can meet almost any goal ranging from almost-immediate Corporate/Nonprofit/LLC set up, to providing free-of-charge a consultation with your attorney prior to choosing the best entity and structure for you.

We look forward to reviewing your request and will work to respond to you promptly if our firm can serve your needs.

Sincerely,

The Legal Team of Scott, Ray & Sullivan, PLLC

**1. Company Name – Use exact punctuation, capitalization, and spacing.**

First Choice	
Second Choice	
Third Choice	

**2. Company will be run by:**

Owners	
Non-Owners	

**3. Select Member(s) required to sign Interest Certificates a/k/a Stock Certificates:**

Secretary	
President	
Member or Manager	
Member or Manager	

**4. Registered Agent – The person who receives legal notices for your company.**

Our package includes a free one-year subscription to a Registered Agent service which will receive these notices and promptly notify you. You will be contacted upon expiration if you choose to continue the service for \$10 a month. If you forego this service, it is recommended to use contact information remaining unchanged throughout your business, because this ensures you receive notice of important deadlines even after relocating or changing ownership.

Use Free One-Year RA Subscription	
Select Own RA (fill in contact info)	
Name	
Address	
City , State , Zip	

**5. Initial Governing Persons:**

Name and Mailing Address	
Name and Mailing Address	
Name and Mailing Address	
Name and Mailing Address	

**6. Principal Place of Business:**

Address	
City, State, Zip	

**7. Organizational Meeting:**

- a. Do you want to utilize our included service of overseeing your Organization Meeting at our law offices?

No – I will hold the Organization Meeting myself on the following date:	
Yes – Please provide three available dates/times for this meeting:	

- b. Who will preside over the Organizational Meeting?

Name Position	
Name Position	

- c. Who will be the Officers named at the Organizational Meeting?

President	
Secretary	
Vice President (Optional)	
Treasurer (Optional)	
Other (Optional)	

- d. Initial Members and Units of Membership

Name and Mailing Address	Percentage Ownership	Initial Contribution Value

**8. Banking (optional, but recommended):**

Which Bank do you intend to use for your company?
Name and Title of each person authorized to draw on your company's accounts:

## 9. Strategic Estate Planning

**Do you want to discuss ways to avoid probate, protect your assets, or other estate planning strategies?**

Yes		No	
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**10. Please use space below to provide additional information or questions.**

[illegible]

## 11. Contact Information for Free Consultation

Consultation Preference	Phone		In Person	
Preferred Days of Week for Consultation				
Preferred Times of Day for Consultation				
How did you hear about our firm?				

Please submit your completed worksheet to our firm via one of the following:

Email: [Roxana@scottraylaw.com](mailto:Roxana@scottraylaw.com)

Fax: (903) 454-1514

Mail: PO Box 1353, Greenville, Texas 75403-1353

Need help or have questions about this form?

Contact Roxana La Rosa at: [Roxana@Scottraylaw.com](mailto:Roxana@Scottraylaw.com) or (903) 269-3614.