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NEW ENTITY INFORMATION SHEET

TYPE: Corp LLC LLP DBA Other

IF LLC check one: Manager Managed Member Managed

Entity Name: _____

(Second Choice) _____

Entity Principal Address: _____

County: _____

OWNERSHIP:

Shareholder/Member 1:

Name: _____ # Shares/% Interest: _____

Address: _____

Phone: _____ Email: _____ SS #: _____

Shareholder/Member 2:

Name: _____ # Shares/% Interest: _____

Address: _____

Phone: _____ Email: _____ SS #: _____

Shareholder/Member 3:

Name: _____ # Shares/% Interest: _____

Address: _____

Phone: _____ Email: _____ SS #: _____

MANAGEMENT:

(If also a Shareholder/Member, just put name and title and skip the contact info)

Officer/Manager 1:

Name: _____ Title: _____
(Ex. President, Manager)

Address: _____

Phone: _____ Email: _____ SS #: _____

Officer/Manager 2:

Name: _____ Title: _____
(Ex. President, Manager)

Address: _____

Phone: _____ Email: _____ SS #: _____

Officer/Manager 3:

Name: _____ Title: _____
(Ex. President, Manager)

Address: _____

Phone: _____ Email: _____ SS #: _____

TAX AND OTHER INFO:

Entity Purpose:

Real Estate/Commercial (Owning & Leasing) Real Estate/Residential (Owning & Leasing)

Construction Other: _____

Principal Activity *(describe):* _____

Will the entity have employees in the next 12 months who will receive Forms W-2?

YES NO If YES, how many? _____

Tax Filing Status:

LLC: Single Member (Disregarded Entity) Partnership S Corporation

Corporation: S Corporation C Corporation

Bank Name: _____

Accountant Name & Email: _____

The above information has been reviewed and is correct:

Name

Date