

New Business Worksheet



Please complete the following for the formation of your small business (LLC, partnership and corporation).

Name of Business:	
First Choice:	
Second Choice:	

Basic Types of Entities: (Place an X in the appropriate Box)

Limited Liability Company (LLC) - Requires and Operating Agreement		Select
Single Entity (Individual) Taxed as Sch. C	LLC for CA Secretary of State Individual Owner pays Inc. Taxes	
Multiple Entities (Owners) Taxed as a Partnership	LLC for CA Secretary of State. Individual Partners pay Inc. Taxes	
Single or Multiple Entities Tax as an S Corporation	LLC for CA Secretary of State Indiv. Shareholders pay Inc. Taxes	
Single or Multiple Entities Tax as a C Corporation	LLC for CA Secretary of State Corporation pays Inc. Taxes	
Corporation - (Requires regular Board Meetings and Minutes)		Select
Shareholder(s) own Co. and taxed as an S Corporation	Corporation for CA Sec. of State Indiv. Shareholders pay Inc. Taxes	
Shareholder(s) own Co. and taxed as an C Corporation	Corporation for CA Sec. of State Corporation pays Inc. Taxes	
Please Note: In California, we may also convert your existing LLC into a Corporation (other states vary)		

Business Contact Information

Business Location: _____

Mailing Address: _____

Registered Agent: _____
Phone #: _____ - _____ Email: _____

Owership Information:

Name: _____ SSN: _____ - _____ - _____ Own % _____
Address: _____
City, State, Zip: _____
Phone #: _____ - _____ Email: _____

Name: _____ SSN: _____ - _____ - _____ Own % _____
Address: _____
City, State, Zip: _____
Phone #: _____ - _____ Email: _____

Name: _____ SSN: _____ - _____ - _____ Own % _____
Address: _____
City, State, Zip: _____
Phone #: _____ - _____ Email: _____

Name: _____ SSN: _____ - _____ - _____ Own % _____
Address: _____
City, State, Zip: _____
Phone #: _____ - _____ Email: _____

Name: _____ SSN: _____ - _____ - _____ Own % _____
Address: _____
City, State, Zip: _____
Phone #: _____ - _____ Email: _____

Type of Business:

Please describe the general activities and purpose for the business (retail, construction, manufacturing, etc.)

Other Filings:

Do you want us to assist you in preparation of Secretary of State* filings? Yes ____ No ____ Maybe ____

Do you want us to apply for your Federal Employer ID Number (EIN)? Yes ____ No ____ Maybe ____

Do you want us to complete and file form 2553 (S Corp Election)? Yes ____ No ____ Maybe ____

Do you need assistance / training in setting up your Quickbooks®? Yes ____ No ____ Maybe ____

We are Advanced Certified ProAdvisors® for all Quickbooks® platform, such as:

Desktop Pro, Premiere, Enterprise Point-of-sale, and Quickbooks® Online

For more information on Quickbooks® offerings and service go to: www.ardentbiz.com/accounting-services

* California only

Owner Signature

Printed Name

Date

Owner Signature

Printed Name

Date

Owner Signature

Printed Name

Date

Owner Signature

Printed Name

Date

