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### **LLC Information Sheet**

1. Name of the LLC: \_\_\_\_\_
  
2. Names, addresses, phone numbers, Social Security numbers, email addresses, and percentage of ownership in the LLC for all the LLC's Members (i.e., owners):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
3. Names of the initial Managers of the LLC:  
(Note: The Managers of an LLC generally have responsibilities and duties similar to those of the Board of Directors of a corporation. Please include addresses, phone numbers, Social Security numbers, and email addresses for each Manager if not already provided in Question 2 above.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
  
4. Names of the LLC's initial officers (if any)(i.e., President, Vice President, Secretary, Treasurer):  
(Note: Managers can either handle the roles usually performed by officers in a corporation or the Managers can delegate those roles to officers. Please include addresses, phone numbers, Social Security numbers, and email addresses for any officers if not already provided in Question 2 above.)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

1829 East Franklin Street, Suite 800C, Chapel Hill, NC 27514

Phone: 919 933 2700 Fax: 919 942 4360 Email: info@rlfpa.com Web: www.rlfpa.com

5. a. Street address of the LLC's initial registered office in the State of North Carolina:  
(Note: This is the LLC's "official" address with the State of North Carolina and cannot be a post office box or private mail box (PMB).)

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b. Name of Initial Registered Agent: \_\_\_\_\_

6. Preferred mailing address for the LLC (if different from the LLC's registered office street address listed above):

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7. Address of the LLC's principal place of business in North Carolina (if different from the LLC's registered office street address listed above):

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8. Will the LLC elect to be taxed as an S corporation? (Note: We will discuss this issue and your options with you if you are unsure how to answer this question.)

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9. Type of business/principal activity to be engaged in by the LLC:

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10. Estimated number of employees that the LLC is expected to have within the first 12 months after it is organized (including any members who will be employed by the LLC): \_\_\_\_\_

11. Does the LLC need a sales/use tax number? \_\_\_\_\_  
If so, to whom are most of the LLC's products/services sold? Other businesses (wholesale) or the public (retail)? \_\_\_\_\_

12. Date when the LLC began/expects to begin doing business? \_\_\_\_\_

13. Is the business located within the city limits? \_\_\_\_\_

14. Number of business locations in North Carolina? \_\_\_\_\_

## Reminders to Clients:

1. If this is a continuation of an existing business (i.e., a proprietorship or partnership which is now incorporating), you will want to transfer the business' account with the North Carolina Division of Employment Security to the new LLC so that the business can carry forward its credits and rating. You will need to contact NCDES to do this. Otherwise, you will want to contact NCDES to set up a new account if you will have any employees. Alternately, let us know if you would like our assistance with this.
2. If this is a continuation of an existing business, you will want to advise your workers compensation insurance carrier that the business is now an LLC once the organization of the LLC is completed. Otherwise, you should check with your insurance carrier to see if workers compensation or other insurance coverage is required or desirable for your new business.
3. Even if this is a continuation of an existing business, it will generally need a new employer identification number. We will obtain this number for you as a part of the services we provide in connection with the organization of the LLC unless you instruct us otherwise (such as where you have already obtained the number yourself or where your accountant is planning to do so).
4. Likewise, even if this is a continuation of an existing business, it will need a new North Carolina income tax withholding number if it will have any employees. We will obtain this number for you as a part of the services we provide unless you instruct us otherwise (such as where you have already obtained the number yourself or where your accountant is planning to do so).