

# Client interview checklist for a Corporate Outfit

## Instructions

This Adobe PDF form for ordering a Corporate Kit (also called Outfit) lets you fill in the form onscreen or print it and fill it out by hand. You can submit the form to Lawyer’s Aid by email, by printing and faxing, or by phone. The form can be saved on your computer, copied, and reused.

The electronic version of the checklist features **key questions**. Answering key questions (those with a ⇨) makes other appropriate questions become active for you and shows active blue boxes.

Useful tips pop up when your mouse hovers over many of the blanks.

**Each Corporate Kit contains** bylaws, minutes, embossing seal, 20 share certificates, transfer ledger, tax guidance, and extensive forms on archive bond paper. The black vinyl three-ring binder shows the company name in gold on its spine, and stores in a matching dust-proof slipcase. In the Deluxe Kit (**for attorneys only**), all text is custom-typed with your information seamlessly filled in. The Standard Kit comes with blanks to fill in.

## A. Checklist for Corporate Outfit

⇨ 1. Type of corporate outfit:

- Deluxe Customized (for attorneys only): **Fill in all items. (Items 8-18 may be left blank.)**
- Standard: **Fill in items 1-7 only.**

⇨ 2. Entity type:  For-profit  Close for-profit  Professional (PC)  Close PC

3. Corporate name. Use exact punctuation, capitalization, and spacing.

\_\_\_\_\_

4. The company will be governed by its:

- Directors
- Shareholders (option for close corporations only)

5. Total shares authorized: \_\_\_\_\_ Par value: \_\_\_\_\_

6. Add optional special clauses to the share certificates? (Check any that apply. Call for exact text.)

- 1244 stock
- Buy-sell agreement
- Other (custom language attached)
- Affirm preemptive rights
- Deny preemptive rights
- Affirm cumulative voting

7. Stock certificates:

Number of signature lines on the share certificates (4 is maximum): \_\_\_\_\_

Please specify the title for each signature line (e.g. Secretary, President, Treasurer, Director):

\_\_\_\_\_

8. Purpose (for PCs only): “the practice of \_\_\_\_\_” (profession)

9. Registered agent and registered office street address:

Registered agent: \_\_\_\_\_

Registered office street address: \_\_\_\_\_

Registered office city: \_\_\_\_\_ State: TX Zip code: \_\_\_\_\_

**10. Initial governing person(s):**

Number of initial governing persons (minimum of 1): \_\_\_\_\_

Names (use [Instructions Box](#) below for overflow):**11. Initial principal place of business of the corporation (complete street address is best):**

12. Organizational meeting: Date: \_\_\_\_\_ Time: \_\_\_\_\_ City: \_\_\_\_\_

Chair: \_\_\_\_\_ Secretary: \_\_\_\_\_

**13. Officers:**

Pres.: \_\_\_\_\_ Sec.: \_\_\_\_\_

VP: \_\_\_\_\_ Treas.: \_\_\_\_\_

Other (name and title): \_\_\_\_\_

**14. Per-share price of shares to be initially issued at organizational meeting: \$ \_\_\_\_\_**

| Shareholder name | Number of initial shares | Nature and value of payment for shares |
|------------------|--------------------------|--|
|                  |                          |  |
|                  |                          |  |
|                  |                          |  |
|                  |                          |  |
|                  |                          |  |

**15. Banking Resolution (optional, but required by many banks):**

a. Name and address of bank selected as company depository:

b. Name and title of each person to be authorized to draw on company accounts:

16. Any custom clauses or documents attached?  No  Yes, add to:  Bylaws  Minutes

17. Formation date (if known): \_\_\_\_\_ Filing number (if known): \_\_\_\_\_

18. Blanks (for attorney or client to fill in) to be indicated by:  underlines (default)  spaces**B. Your further instructions, if any:**

### C. Order form, prices, and contact information

Prices *include* all sales tax and mail/shipping costs. Prices may change without notice.

#### 1. To order, select the services and outfit desired:

**Deluxe Customized Corporate Outfit**

Seamlessly typed documents and forms customized with your company name in every title and footer. We fill in the bylaws and organizational meeting minutes with your custom information. Outfit includes 20 deluxe certificates, share transfer ledger, customized embossing seal, minutes, bylaws, forms, binder and slipcase.

Customized Outfit for corporation..... **\$88**

**Standard Corporate Outfit**

Like Customized Outfit, but with blanks in the preprinted text for you to fill in.

Standard Outfit for corporation ..... **\$54**

**Long name on Corporate Outfit**

41+ characters in company name..... **\$10**

**Rush: Outfit ships same day**

Order by noon for same-day rush..... **\$10**

**Rush: Outfit ships next weekday**

Order by 5 pm for next-day rush..... **\$5**

**Federal Express service:**

Call (888) 474-2112 for options .. **Add \$\_\_\_\_\_**

#### 2. Total for the above services and outfit selected ....

\$

#### 3. Submit to Lawyer’s Aid Service:

**Email** to [maindesk@LawyersAidService.com](mailto:maindesk@LawyersAidService.com)

**Print and fax** to (888) 474-4218

**Call** (888) 474-2112 to place your order

#### 4. Please mail payment simultaneously to:

Lawyer’s Aid Service, PO Box 848,  
Austin, Texas 78767-0848

#### Guarantee

Unless you are thoroughly satisfied with your Corporate Outfit, Lawyer’s Aid Service will replace it or send you a full refund.

Attorney’s name: \_\_\_\_\_

Phone: \_\_\_\_\_

Contact name: \_\_\_\_\_

Phone: \_\_\_\_\_

Firm name: \_\_\_\_\_

Fax: \_\_\_\_\_

Street address: \_\_\_\_\_

City: \_\_\_\_\_

State: \_\_\_\_\_

Zip: \_\_\_\_\_

Country: \_\_\_\_\_

Email: \_\_\_\_\_

Type or sign your name below to confirm you are sending simultaneous payment (required)