

Client interview checklists for limited partnership formation, binder and EIN

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Easy instructions for the fillable PDF form

This Adobe PDF form lets you electronically fill in the form to print out, reuse, or attach to an email for submission. Visit www.LawyersAidService.com for the most up-to-date version. You must have Adobe Reader version 8 or later for this document to function correctly. Download it [here](#).

The electronic version of the checklist features **key questions**. As you answer the key questions (those having a ⇄), other appropriate questions become active for you. Change your key choices, and different questions become active. Inactive questions will have no active blue boxes.

If filling out electronically, hover your mouse over many blue selection boxes to view a pop-up with information about that question. The last page of the checklist automatically totals your order to make it easier to mail payment simultaneously.

When finished, you can submit your order form by mail, by printing and faxing, or by email. There is also a “Clear form” button on the last page.

Add your further instructions and overflow text in the box on [page 4](#).

Instructions box:

Covered in these checklists

Limited partnership formation

Section A lets you set up a new Texas limited partnership, have Lawyer’s Aid check the name availability, create the Certificate of Formation on archive bond, advance the filing fees, walk it through, and help you resolve any problems on the spot. Turnaround is normally 24 hours or less. For other entities and filings, see our website, or call (888) 474-2112.

Professional registered agent service

On question 2 of Section A, you can designate Lawyer’s Aid as the company’s registered agent. For peace of mind about handling of legal notices, including lawsuits, a professional registered agent service is recommended. If you choose Lawyer’s Aid, we’ll follow up to get your contact instructions.

Customized binder, slipcase, and embossing seal

In Section B, you can choose to order a customized binder and slipcase, an embossing seal with the limited partnership’s name, or both. The black vinyl three-ring binder shows the company name in gold on its spine, and stores in a matching slipcase.

IRS Employer Identification Number (EIN)

Section C allows you to order an EIN for a Limited Partnership and explains how to get an EIN for the general partner also. Lawyer’s Aid deals with the IRS instead of you to get the federal tax ID. You receive the EIN on the SS-4 form usually in 24-48 hours by your choice of email or fax, then mail. Multiple EINs for related entities are discounted.

A. Limited partnership formation checklist

1. Proposed LP name and two alternatives. LP names must contain limited, limited partnership, or an abbreviation. The name of an LP that will register as a limited liability partnership must also contain limited liability partnership, or an abbreviation. **Use exact punctuation and spacing.**

2. a. Registered agent and registered office **street** address: [RA Duties](#)

- Lawyer’s Aid Service, Inc., 408 West 17th, Suite 101, Austin, TX 78701 [RA Benefits](#)
- Other registered agent and office (PO box not allowed. If rural, street description plus PO box is allowed.):

Registered agent: _____
Registered office street address: _____
Registered office city: _____ State: _____ Zip code: _____

- b. The RA has consented to serve. (required)
- c. Also file RA’s signed written consent. (optional free form at LawyersAidService.com/RA)

3. Principal office address in the United States:

- The principal office address is the same as the registered office address (above).
- Other:

4. Name(s) and address(es) of the general partner(s):

5. *Optional:* If adding a delayed effective date/time to the Certificate:

LP formation will be effective on _____, 20____ at _____ am/pm

6. Add your custom clause to the Certificate? No Yes, text attached in instruction box on [page 4](#)

B. Checklist for customized binder, slipcse, and embossing seal

7. Would you like a black three-ring binder, slipcse, and embossing seal customized with the limited partnership’s name? (see [page 3](#) for fees)

- Binder, slipcse, and seal
- Binder and slipcse only
- Embossing seal
- None

(continued)

C. Checklist for IRS Employer Identification Number (EIN)

☞ To register the new LP with the IRS, a federal requirement, check the box to the left.

All fields are required.

Lawyer's Aid Service obtains your EIN, usually the same day or the day after the LP is formed, and reports it to you immediately. You receive Form SS-4 by mail for your records. To order an EIN for any other kind of business entity, call (888) 474-2112 or see [our website](#).

8. Limited partnership name (if already known):

9. Street address for tax purposes:

10. Mailing address, if different:

11. Name of the general partner:

12. EIN (or Social Security Number) of the general partner. The general partner is:

- A person, whose Social Security Number is _____.
- A corporation, LLC, or other entity and its EIN is _____.
- Lawyer's Aid is to obtain the EIN for the general partner. (Lawyer's Aid will send you a checklist for this EIN, or you can obtain one now at LawyersAidService.com.)

13. Name of the president of the general partner:

14. Closing month of accounting year: December (recommended) other:

15. Fill in this box only if there will be employees in the next 12 months:

Highest number of employees expected in next 12 months:

Agricultural: _____ Household: _____ Other: _____

Earliest date wages may be paid: _____

Do you expect to pay \$4,000 or less in wages next calendar year (Jan. – Dec.)? Yes No

16. Type of business or activity (e.g. healthcare, construction, transportation, food service, real estate, retail, etc.):

17. Specific merchandise sold or produced, or services provided:

18. Business phone:

19. A Lawyer's Aid Service representative is authorized as third-party designee to obtain the EIN.

20. Notify me of EIN by: fax phone e-mail (Original is mailed with bill.)

Fax, phone, or email address: _____

☞ A **key question** that activates other questions for you

(continued)

D. Order form, prices, and contact information

Prices *include* state filing fees, sales tax, and mail/shipping costs. All prices may change without notice.

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

Instant LP Formation

Get the quickest turnaround time possible. Lawyer's Aid checks for name availability; drafts and files the Certificate; obtains the Acknowledgment of Filing; phones, faxes, or emails you with the Acknowledgment (your choice); and mails it with the file-marked Certificate.

Limited Partnership (\$775 state fee)**\$825**

Registered agent service, prorated 1st year:

When a lawsuit is served, the attorney is called immediately. The citation is sent to you via email, FedEx, or fax, according to your instructions, and then mailed as well.

Cost: \$10 per month left in this calendar year.

Future years are \$120\$ _____

EIN service

Lawyer's Aid obtains your IRS EIN and provides you with a copy of form SS-4

One EIN for a business entity.....**\$50**

Two related EINs.....**\$65**

Customized binder, slipcase, and seal

Professionally organize your important limited partnership documents with a customized three-ring binder, slipcase, and embossing seal (satisfaction guaranteed).

Binder, slipcase, and seal**\$37.50**

Binder and slipcase only**\$16.50**

Embossing seal only.....**\$22**

Long name on embossing seal

41+ characters/spaces in partnership name **\$10**

Rush Outfit (same day, order by noon)**\$10**

Federal Express service:

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

2. Total the above services and items selected \$

3. Submit to Lawyer's Aid Service:

Email to maindesk@
LawyersAidService.com

Print and fax to
(888) 474-4218

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

Please mail your payment simultaneously to:

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

Guarantee

Unless you are thoroughly satisfied with your binder or seal, 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)

E. Your further instructions

Please use this box to:

- Enter any special instructions you have about this order, including overflow text, special clauses, or queries about other services.
- Share your comments, complaints, or suggestions. How can we make things better?
- Tell us how to contact you about this order, if you have a preference.
- Let us know how you heard about Lawyer's Aid. An ad? A person?

If, when faxing or mailing in the form, any text overflows the box, please attach it.

Instructions box: