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**Client Intake Form**

Name: \_\_\_\_\_

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

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

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

Preferred format for emailed documents \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Matter: \_\_\_\_\_

Referred By: \_\_\_\_\_

How do you prefer to be contacted? \_\_\_\_\_

Is this a Rush Job? \_\_\_\_\_

**Pattie S. Christensen, Esq**  
**Information for New Clients**

Thank you for selecting Utah Estate Planners PLLC for your legal matters. To ensure that you get the most out of the relationship, please read this information.

The responsible attorney is: Pattie S. Christensen, Esq.

**Office Hours:**

Regular office hours are Monday through Thursday 9:00 am to 5:00pm Mountain time. Emails are reviewed after hours to ensure response within 24 hours.

**Email Contacts:**

For emails with specific legal questions or specifically for Pattie S. Christensen, use [pchristensen@pattiechristensen.com](mailto:pchristensen@pattiechristensen.com)

**Billing:**

Standard entity formations cost \$300 plus the state filing fees. Custom drafting and additional documentation is performed at the hourly rate. Billing is based on hourly rates, charged in tenths of an hour. The normal rate is \$215 per hour, with a \$50 an hour discount for clients who prepay or who utilize credit card payment plans.

Bills are sent out on a monthly basis. Payment is expected within 15 days unless prior arrangements have been made. Clients who are delinquent in payment may have their rates increased by \$50 per hour or may be “fired” as a client. Accounts over two months delinquent may be referred to a professional collection agency and you will be responsible for any and all costs associated therewith. If you suspect you may have payment problems, please discuss this matter with Pattie in advance. If you have a question about a bill, please contact the office before the 15<sup>th</sup>.

New clients may be asked to pay in advance for a portion of the work which will be performed in the same month and may be asked to pay in advance for filing fees. Formal retainers are not required.

Check the billing statement for notices about changes in billing practices or other information.

## BUSINESS PLANNING BASIC QUESTIONNAIRE

*NOTE: This questionnaire is designed to assist you in preparing for our meeting. It is not necessary or expected that you complete every item. If there is a question in this questionnaire that you do not understand, simply leave the question blank and we will discuss it at our meeting.*

### COMPANY CHECKLIST

CLIENT \_\_\_\_\_

**NAME OF COMPANY:** \_\_\_\_\_

(Backup names if first choice not available: \_\_\_\_\_)

Type of Company:

- \_\_\_ C- corporation
- \_\_\_ S- corporation
- \_\_\_ Limited Liability Company
- \_\_\_ Limited Partnership

State of Company Domicile: \_\_\_\_\_

Address of Company: \_\_\_\_\_  
\_\_\_\_\_

Registered Agent: \_\_\_\_\_

Address of Registered Agent: \_\_\_\_\_  
\_\_\_\_\_

OWNERS:

NAME	ADDRESS	Ownership Interest

If corporation, total authorized shares \_\_\_\_\_

**Managers/ Officers/ Directors:**

Name	Office/Position

Purpose of Company: \_\_\_\_\_

\_\_\_\_\_

Special Provisions to be addressed: \_\_\_\_\_

\_\_\_\_\_

Assets to be transferred to company upon formation: \_\_\_\_\_

\_\_\_\_\_

Social Security Number of Manager/General Partner/ Officer of Company

\_\_\_\_\_

\* only needed if I will be obtaining an EIN for the company

## **Deciding On A Business Type**

**By, Pattie S. Christensen, Esq.**

So you have a great business idea. Now it's time to form the company. Partnership? LLC? S-corp? C-corp?

There are three basic entity types: partnerships, limited liability companies, and corporations.

Partnerships can be either general partnerships or limited partnerships. A general partnership is an informal association of one or more partners. Each partner has unlimited personal liability for the debts and expenses of the company. A limited partnership is a formal association of partners. The limited partners are not actively involved in the company and are not personally liable for the debts of the company. The general partners manage the affairs of the company and have unlimited personal liability for the debts and expenses of the company. The partnership does not pay taxes on its income; rather, the items of income and expense flow down to the partners.

Limited liability companies (LLCs) have generally replaced limited partnerships. In LLCs, all owners are not personally liable for the debts of the company. The owners are called "members." The LLC is managed by "managers" who may or may not be owners of the LLC. The Internal Revenue Service allows LLCs to choose to either be taxed as a partnership or as a corporation.

Corporations are formal legal entities. Corporations must follow certain formalities in order for the owners to not be personally liable for the debts of the corporation. The owners are called "shareholders." The day to day operations of the corporation are handled by the "officers" who act under the direction of the "directors." Typically corporations are subject to double taxation, meaning that the corporation pays taxes on its income and then the shareholders pay taxes on the dividends. If certain restrictions are met, a corporation can elect to be taxed as an "s-corporation." Generally s-corporations are subject to a single level of taxes, divided between income and dividends.