

CONSENSUS, LLC
Client Intake Sheet

Date of Initial Contact

GENERAL INFORMATION

Company Name:

Founder/Developer Name(s):

Registered Agent :

Company Address:

Company Phone Number & Best Hours:

Email Address:

Internet Address:

COMPANY INFORMATION

Mission Statement/ Purpose:

Vision/Intentions:

Bylaws / Policy and Procedures:

Plans:

5 year plan:

3 year plan:

1 year plan:

Model Companies:

FINANCIAL INFORMATION (TBD)

ERP Software: (i.e. Microsoft Office Suite, Quickbooks, Xero, Tableau, etc)

Funding Sources: (i.e. Private etc)

Projected Sources of Revenue:

Accounting for Expenses:

Inventory of Assets:

Inventory of Liabilities:

TAX INFORMATION

Sole Proprietorship

General Partnership / Limited Liability Partnership (LLP)

Limited Liability Company (LLC)

Corporation / S Corporation

Non Profit / For Profit

LEGAL INFORMATION

State of North Carolina Reservation of Name: Y or N

State of North Carolina Business Registration: Y or N

State of North Carolina Charitable License : Y or N

State of North Carolina Annual Filing Report:

Internal Revenue Service (IRS) Tax Identification Number or EIN:

IRS Annual US Tax Filing:

NOTE: TBD = To be discussed in detail during meeting