

CORPORATION FORMATION QUESTIONNAIRE



**ROBERTS
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ATTORNEYS AT LAW

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I. Organizational Documents

A. Name of Corporation: _____

B. Name of registered agent:

- Yourself Brian C. Eddy Stephanie A. Sailer
 Jeremy B. Hahn Nick A. Sailer Andrew E. Steffensmeier

C. Address of registered agent (no PO Box) (publicly available):

D. Address of home office (i.e., where the company's records are kept) (publicly available):

E. Name of incorporator:

- Brian C. Eddy Stephanie A. Sailer Jeremy B. Hahn
 Nick A. Sailer Andrew E. Steffensmeier

F. Is this an incorporation of an existing business? Yes No

G. Date of Incorporation: Upon formation Future date: _____

H. Names of the Members of the Board of Directors:

I. Names & Addresses of Officers:

	Name	Current Residential Address
CEO/President		
Secretary		
Treasurer		

J. Shareholders (if more than three, attach separate sheet):

1. Name: _____
Address: _____
SSN: _____
Telephone: _____
Email: _____
Amount Contributed for Shares: \$ _____

2. Name: _____
Address: _____
SSN: _____
Telephone: _____
Email: _____
Amount Contributed for Shares: \$ _____

3. Name: _____
Address: _____
SSN: _____
Telephone: _____
Email: _____
Amount Contributed for Shares: \$ _____

II. **IRS: Application for Federal Tax ID #**

A. Mailing Address of Corporation: _____

B. Principal Officer and their social security number:
_____ SSN: _____

C. To be taxed as a S Corporation? Yes No

D. Employees: If any, how many? _____ Date wages will first be paid? _____

E. Principal Activity: _____

F. Tax Year End: December (if fiscal tax year, insert here: _____)

G. Phone Number of Corporation: _____

H. Email Address: _____

III. Iowa Department of Revenue: State Withholding (SWH) and/or Sales Tax

A. Names and social security numbers of at least two shareholders:

_____ SSN: _____

_____ SSN: _____

B. Will the corporation have employees and need a SWH number? Yes No

C. Will the corporation be selling items and need to be registered for sales tax? Yes No

D. If yes to "C" above:

a. Will there be sales every month of the year? Yes No

b. If "No," please list the months you expect to have sales:

c. What is the projected amount of sales tax to be collected annually? (If it's less than \$1,200, you'll need to file sales tax annually; if it's \$1,200 or more, you'll need to file monthly.) _____

d. What is the start date for collecting sales tax? _____

IV. Iowa Workforce Development and Iowa Division of Labor: Application for UI Account Number and/or Contractor Registration

A. If no employees, will the business need a State Unemployment Tax Account (SUTA) number for a Contractor Registration? (Note: Construction related companies are usually the only business that need a contractor registration number) Yes No

B. If yes to "A" above, provide the names, addresses, and social security numbers of all members (if applicable): _____ SSN: _____

_____ SSN: _____

_____ SSN: _____

C. Would you like us to prepare the Contractor Registration Application? Yes No