



# McDONALD LAW FIRM, LLC

*Helping Preserve Your Family's Legacy*

## BUSINESS PLANNING WORKSHEET

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This organizer will assist us in designing an estate plan that meets your goals.  
Please return the completed worksheet to our office at least a week before your appointment.

**PLEASE READ BEFORE COMPLETING THIS FORM!!**

This is a fillable PDF, which means that you can type directly into the form and choose from predetermined fields. You may also print the form and complete it by hand. Please follow the instructions below based on how you will complete the form.

**IF COMPLETING THE FORM ON A COMPUTER:**

**NOTE:** You must complete the form in one session, or leave the form open on your computer in between sessions. You cannot save the form and have it 'save' your data.

- Complete the form to the best of your abilities
- Scroll back to the cover page (this page)
- Click on 'Submit by Email' button at the top of the page.
- Follow directions. Form will be submitted to our office.

If you would like a hardcopy, or would like to send a hardcopy, please click on the 'Print Form'. For mailing, use the address at the bottom of this page.

**IF COMPLETING BY HAND:**

- Click on 'PRINT FORM' button at the top of the page.
- Complete the form to the best of your abilities. From here you can either: fax, mail or send the form via email as an attachment.

**Mailing Address:**

McDonald Law Firm, LLC  
10500 Little Patuxent Pkwy. Suite 420  
Columbia, MD 21044  
**Fax:** (443) 977-6977  
**Email Address:** [aom@mcdonaldesq.com](mailto:aom@mcdonaldesq.com)

***All information provided is strictly confidential.***

## Business Information

Current or Proposed Business Name \_\_\_\_\_

Type:  To be discussed  Limited liability company  C Corporation  S-Corporation  General Partnership  
 Limited Partnership/LLP/LLLP  Nonprofit  Sole proprietorship  Other: \_\_\_\_\_

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

Street Address \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

## Reason for Business Planning Inquiry

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

## Important Questions

(Please check "Yes" or "No" for your answer)	Yes	No
Should business activities be limited to specified business purpose, such as provision of professional services? <i>Describe</i> _____		
Does or will this business conduct activities in states other than the state in which it is formed? <i>List</i> _____		
Do you know of any actual or potential litigation against the company or any of its owners? <i>Describe</i> _____		
Do you know of any actual or potential tax, bankruptcy, or administrative proceedings against the company or any of its owners? <i>Describe</i> _____		
Does or will this business have different classes of equity that entitle the owners to different voting or economic rights?		

## Other Advisors

Name	Telephone
Current Attorney (if any) _____	_____
Accountant _____	_____
Financial Advisor _____	_____
Life Insurance Agent _____	_____

## Party Information

**Full Name** \_\_\_\_\_

Type:  Individual  Business or organization

If individual: Prefer to be called \_\_\_\_\_ US Citizen? \_\_\_\_\_ Residence County \_\_\_\_\_

If business: Business Type \_\_\_\_\_ Formation State \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

**Full Name** \_\_\_\_\_

Type:  Individual  Business or organization

If individual: Prefer to be called \_\_\_\_\_ US Citizen? \_\_\_\_\_ Residence County \_\_\_\_\_

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Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

**Full Name** \_\_\_\_\_

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Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

**Party Information (Continued)**

**Full Name** \_\_\_\_\_

Type:  Individual  Business or organization

If individual: Prefer to be called \_\_\_\_\_ US Citizen? \_\_\_\_\_ Residence County \_\_\_\_\_

If business: Business Type \_\_\_\_\_ Formation State \_\_\_\_\_

Street Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

**Full Name** \_\_\_\_\_

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Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

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Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

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Telephone \_\_\_\_\_ E-mail Address \_\_\_\_\_

Role:  Owner  Manager/Director  Officer  Other: \_\_\_\_\_

## Discussion Items

Use this section to indicate your areas of concern that you would like to discuss in our consultation:

Description	Check All That Apply
Assistance with selecting the correct form of entity for business liability, personal asset protection, and strategic tax planning purposes.	_____
Preparation or review of entity formation documents, including certificates of incorporation, certificates of rights, preferences and designations, articles of incorporation, bylaws and organizational minutes, shareholder agreements and operating agreements.	_____
Negotiating and drafting buy-sell agreements to address what happens if a co-owner dies or leaves a business, including cross-purchase and entity-purchase agreements or other forms of buy-out agreements.	_____
Negotiation and drafting of asset purchase agreements, stock purchase agreements or other merger and acquisition agreements and ancillary documents.	_____
Executive employment agreements, consulting agreements, stock option plans and stock option awards, equity incentive plans, stock appreciation rights and phantom stock agreements, non-compete agreements, proprietary inventions and non-disclosure agreements, and non-qualified deferred compensation agreements.	_____
Plan for the transfer and survival of a family business.	_____
Software and technology licenses, content licenses, software development agreements, turnkey computer systems installation agreements, web hosting agreements, web development agreements, and application service provider agreements.	_____
Leases and sub-leases of commercial office space.	_____
Protecting personal (non-business) assets from lawsuits or creditors.	_____
Preserving the privacy of affairs in case of disability or at time of death from business competitors, predators, dishonest persons and curiosity seekers.	_____
Preparation of tax opinions or seeking private letter rulings in connection with tax-free reorganizations or other tax-sensitive business structures.	_____
Borrowing and lending documents, including commercial loan agreements, private indebtedness, security agreements, collateral assignments and pledge agreements.	_____
Sales agreements, sales representative and agency agreements, distribution agreements, value-added reseller agreements, incentive compensation plans.	_____
Estate planning, including avoiding or reducing your estate taxes, avoiding probate, or reducing administration costs at time of your death.	_____

**Other Items for Discussion**

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**Additional Information**

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