## LAW OFFICE OF JENNIFER J. MICKELSON, PC

A general practice law firm focusing on probate & estate planning in MO, KS, & NE

608 SW 3<sup>rd</sup> St. Lee's Summit, MO 64063 (816) 554-7500 (phone) (816) 222-0895 (facsimile) (816) 721-6456 (Alt. Ph.) jen@jenmickelsonlaw.com

## **LLC WORKSHEET**

## **CLIENT/MEMBER/OWNER:** First Name Middle Initial Last Name Date of Birth Social Security Number Phone E-mail Address Street State City Zip County How did you hear about our firm? Marital Status□Married □Single | Are you a Veteran?□Yes □No | Do you have Minor Children □Yes □No **BUSINESS ENTITY INFORMATION:** Name of Business (Check Secretary of State Website for Name Availability) Name of Registered Agent (Person designated to accept official mail & service of legal process on behalf of biz) Resident Agent Street Address City State Zip Physical Street Address of Business City State Zip Mailing Address of Business City State Zip Do you currently have any of the following? □Will □Trust □Power of Attorney □Special Needs Child □Life Insurance □Long-Term Care Insurance □Financial Advisor □CPA □Home/Auto Insurance Agent Would you like a referral to any of the following? □Life Insurance Agent □Long-Term Care Insurance Agent

\*\*\*If there will be additional owners of the business, please complete the next page\*\*\*

□Financial Advisor □CPA □Home / Auto / Commercial / Workers Comp Insurance Agent

ADDITIONAL MEMBE	R/OWNER: (O	ther than client name	d above):	
First Name		Middle Initial	Last Name	
Date of Birth		Social Security Number		% Share
Street	City	State	Zip	County
ADDITIONAL MEMBE	R/OWNER:			
First Name		Middle Initial	Last Name	
Date of Birth	Social Security Number			% Share
Street	City	State	Zip	County
ADDITIONAL MEMBE	R/OWNER:			
First Name		Middle Initial	Last Name	
Date of Birth		Social Security Number		% Share
Street	City	State	Zip	County

Notes regarding business structure: