



Customer Corporation Information Intake
by Creative Finesse

Following are information and items required by Creative Finesse to successfully file your California Corporation. Please be thorough and do not hesitate to question areas that require further clarification. Thank You!

1. Your full name:
2. Your mailing address:
3. Telephone(s): 3a. Fax:
4. Email:
5. New corporation name:
6. New corporation address:
7. New corporation County:
8. Type of corporation: C-Corp LLC Non Profit
- 8a. If Nonprofit, what is the purpose of corporation/type of business?
- 8b. Is Nonprofit seeking a 501c3 tax exemption status? Will you need our assistance with this?
- 8c. If LLC, will it be managed by: One Manager More than One Manager All LLC Co. Members
9. Name(s) of initial Director(s) of Corporation:
10. Person you want to serve as Registered Agent (required by State of California, must be resident of state and will be point of contact for mailings, receipt of service, forwarding of items on behalf of corporation). Corporation may not serve as own Registered Agent. Creative Finesse will serve in this capacity at the cost of \$100 for a one year term.

Name:

Address

Day time telephone



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11. Do you intend to publicly trade stock?

12. Brief Business Description:

13. Preference for date of the Annual Meeting of Directors:

(Typically noted as ex: “first Tuesday of October”, “Second Wednesday of November”, something in this format and based upon date corporation originally formed).

14. Would you like Creative Finesse to obtain your Federal Employer ID# (EIN)?

SS# is required - _____ - _____ - _____

NOTE: In the case of an LLC formation, an EIN may not be required.

15. Do you need additional assistance with your business start-up plans and/or operations, including business plan, business proposals, printed information (logo design, business cards, promotional post cards or leaflets, letterhead, web design, administrative support or other items)? If so, ask Creative Finesse. We are here to assist you with your business support services from start to Finessed! And we provide one time or recurring business support services customized to meet your needs.

My signature below authorizes Creative Finesse to serve as Organizer for my corporation or company based on the terms and specific details outlined and the information provided herein by me. This authorization includes obtaining my EIN if I have selected that option and provided my SS#. I understand that my information will remain confidential and will be utilized only for the purposes outlined and requested in this Customer Information Intake form, and according to the details outlined in the Creative Finesse, “Terms of Use” formation agreement.

Signature

Date

Creative Finesse
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