



Business Planning

A BUSINESS PLAN IS AN "ESTATE PLAN" FOR YOUR BUSINESS AND MORE THAN A SIGNED STACK OF PAPERS, STATE FILINGS, AND A SET OF INSTRUCTIONS.



PROPER BUSINESS PLANNING ALLOWS YOU TO PLAN FOR:

- Yourself and loved ones without giving up control;
- Your current and future concerns for your business;
- The possibility of your own disability;
- What you own to go to whom, when, and the way you want;
- Fully disclosed and controlled costs; and
- Your dreams and goals for yourself, your business, your family, and your assets.

PERSONAL BUSINESS PLAN

- Evaluation - Liability & Documentation
 - Ownership Agreement
 - Employee Agreement
 - Contracts
 - Lease
 - Fictitious Business Name
 - Tax Reporting
- Counseling
- Entity Comparison
- Complexity of Operation
- Management
- Federal/State Entity Formation Compliance
- Exit Opportunities

FEE LEVEL: \$ 1,200

ENTITY - BASED PLAN

- Evaluation - Liability & Documentation
 - Ownership Agreement
 - Employee Agreement
 - Contracts
 - Lease
 - Fictitious Business Name
 - Tax Reporting
- Counseling
- Entity Comparison
- Complexity of Operation
- Management
- Federal/State Entity Formation Compliance
- Exit Opportunities
- Entity Formation
 - Articles Filing
 - Tax ID Number
 - Governing Agreement
 - 1st Organizational Meeting Minutes
 - Statement of Information Filing
 - Stock / Interest Certificates
 - Entity Seal
 - Asset Transfer

FEE LEVEL: \$ 2,400

ENTITY PROTECTION PLAN

- Evaluation - Liability & Documentation
 - Ownership Agreement
 - Employee Agreement
 - Contracts
 - Lease
 - Fictitious Business Name
 - Tax Reporting
- Counseling
- Entity Comparison
- Complexity of Operation
- Management
- Federal/State Entity Formation Compliance
- Exit Opportunities
- Entity Formation
 - Articles Filing
 - Tax ID Number
 - Governing Agreement
 - 1st Organizational Meeting Minutes
 - Statement of Information Filing
 - Stock / Interest Certificates
 - Entity Seal
 - Asset Transfer
- Non-disclosure Agreement
- Non-compete Agreement
- Wealth Preservation Planning
 - Family Control
 - Shareholder Agreement
 - Stock Option Counseling
 - Employee/Employer Benefit Design
 - Retirement Planning

FEE LEVEL: \$ 5,500



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