



Financial Frequency

New LLC/PLLC

Start Up

Congratulations on taking the first step to get your new business launched! This is our intake form to collect the necessary information to set up your new company! If you have a professional license associated with your business (ie CPA, attorney, architect, realtor, etc) then you should form a PLLC - Professional Limited Liability Company

Name of New Business _____

Mailing Address: _____

Physical Address: Same as mailing? Yes/No: _____

Member Name: _____

Address: _____

SSN: _____ D/O/B: _____

E-mail: _____ Phone: _____

Member Name: _____

Address: _____

SSN: _____ D/O/B: _____

E-mail: _____ Phone: _____

Business Purpose: _____

Do you expect your net income to be over \$15,000 in year 1? Yes or No _____

I _____ authorize DiSalvo & Associates to charge my credit card \$500 to file the Articles of Organization, obtain the EIN, prepare a W-9 form, file the s-corporation election (if applicable).

We will e-mail you as soon as it's set up! Congratulations!

With Gratitude,
~Jill DiSalvo



Credit Card Authorization Form

Credit Card #: _____

Billing Address: _____

City: _____ State: _____ Zip Code: _____

Expiration Date: _____

CVV Code: _____

Do you want DiSalvo & Associates PLLC as your Registered Agent?
Yes or No _____

Our registered agent has an annual fee of \$99. Our annual registered agent services include:

- monitor compliance with the state
- accept service for any notices or legal actions against the company

Beneficial Ownership Information Reporting- In order for me to file your BOI for your new company that was formed after January 1st, 2024 I will need a copy of one of the following for each owner of the business:

- State-issued Driver's License
- State/local/tribe-issued ID
- U.S. Passport
- Foreign Passport

What is FinCEN Beneficial Ownership Information?
BOI refers to Beneficial ownership information. Effective January 1, 2024, companies, including corporations, limited liability companies (LLC), as well as some partnerships and trusts are required to provide FinCEN with data regarding the individuals who ultimately hold or manage them.