

# RAINEY LAW, LLP

## Attorneys and Counselors at Law

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### LIMITED LIABILITY COMPANY WORKSHEET

Information provided is held in complete confidence, and is used to analyze a company's needs, and to design company documents (including operating agreements, buy-sell agreements, contracts, etc.).

Preparation of this worksheet is not mandatory prior to the initial appointment with us, but if you can complete the worksheet prior to your appointment, more information and value will be received during the initial consultation.

During the initial appointment, we will determine your specific company needs and goals. The potential cost with your current plan will be analyzed, and methods of reducing costs and accomplishing goals will be discussed.


Instructions: Please mail, fax, or email this worksheet to us filled out. Once you have provided us with this information we can fully update your corporate records. Please answer each question to the best of your abilities. If you need more space to answer a question, please write on the back of the page or attach additional sheets as necessary



### Robert Lee Rainey

Rainey Law, LLP  
Attorneys and Counselors at Law

405-753-1515 Direct  
405-753-1516 Direct Fax  
[RobRainey@OkcLaw.com](mailto:RobRainey@OkcLaw.com)

1601 NW Expressway Suite 600  
Oklahoma City, OK 73118-1460  
[www.OkcLaw.com](http://www.OkcLaw.com) | 

**LIMITED LIABILITY COMPANY  
WORKSHEET**

**I. LLC FORMATION: NAME, AND TERM**

1. Name: \_\_\_\_\_  
(Must contain "limited liability company" or the abbreviation "LLC")

2. Term:  
 Perpetual (Recommended)  
 \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ (Set Termination Date)

3. States where Company will do business  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**II. BUSINESS**

1. Business of the Company (Describe)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. Principal Place of Business (Address)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. Registered Agent (Name and Address)  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**III. MEMBERSHIP LIST AND OWNERSHIP INTERESTS**

1. Please list Member information below:

Name	Physical Address	Email	Phone Number	Capital Contribution

2. If a Member's Capital Contribution is property please describe the Members and the nature of the property:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. What is an agreed value for each property contribution?

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

4. If you wish the Ownership Interest to be measured other than by Capital Contribution please describe below:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**IV. TAX CLASSIFICATION**

1. Will your LLC be taxed as a Corporation or Partnership?

Corporation       Partnership

2. If Corporate Tax is selected, will your LLC make a Subchapter S Tax Election?

YES       NO

**V. MANAGEMENT**

1. How is the Company managed?

**Member Managed** (All Members have equal management rights)

**Managers**



**VII. ASSIGNABILITY OF INTERESTS; RESTRICTIONS ON TRANSFER**

1. Assignability of Interests

Member Consent Required?

**YES**

**NO**

2. If **YES**, then please list the percentage requirement:

Of Majority of Managers

Of All Members

Required Member Percentage:

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

3. Admission of Substitute Member

Vote Required:

Majority in interest of remaining Members

Unanimous Consent

4. Right of First Refusal of the Company Upon Sale of Interest

**YES**

**NO**

5. Option of Company to Purchase Interest Upon Occurrence of Certain Events

**YES**

**NO**

Description of Events:

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

Please contact us if you have questions regarding information to include in your answers on this worksheet.

Robert Lee Rainey  
Direct Line 405/753-1515  
Direct Fax 405/753-1516  
[RobRainey@OkcLaw.com](mailto:RobRainey@OkcLaw.com)  
*Rainey Law, LLP*  
1601 NW Expressway, Suite 600  
Oklahoma City, Oklahoma 73118-1460