

**Love & Associates, Inc.**

3666 Kearny Villa Rd. Suite 300  
San Diego, CA 92123

Phone: 858-614-1831

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www.LoveAndAssociatesInc.com

**CORPORATE INTAKE SHEET**

Please provide all information requested below for proper completion of documents.

**Client Information**

Name \_\_\_\_\_ Date \_\_\_\_\_

Bus. Address \_\_\_\_\_ Time of appt. \_\_\_\_\_  
(PO BOX not allowed by the IRS)

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Day Phone \_\_\_\_\_ Cell Phone \_\_\_\_\_ Email: \_\_\_\_\_

**Name of Corporation** 1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

**President** \_\_\_\_\_ **VP** \_\_\_\_\_

SS # \_\_\_\_\_ SS # \_\_\_\_\_

Shareholder: Y \_\_\_\_\_ N \_\_\_\_\_ Shareholder: Y \_\_\_\_\_ N \_\_\_\_\_

Number of Shares Issued: \_\_\_\_\_ Number of Shares Issued: \_\_\_\_\_

Director: Y \_\_\_\_\_ N \_\_\_\_\_ Director: Y \_\_\_\_\_ N \_\_\_\_\_

**Secretary** \_\_\_\_\_ **CFO/Treasurer** \_\_\_\_\_

SS # \_\_\_\_\_ SS # \_\_\_\_\_

Shareholder: Y \_\_\_\_\_ N \_\_\_\_\_ Shareholder: Y \_\_\_\_\_ N \_\_\_\_\_

Number of Shares Issued: \_\_\_\_\_ Number of Shares Issued: \_\_\_\_\_

Director: Y \_\_\_\_\_ N \_\_\_\_\_ Director: Y \_\_\_\_\_ N \_\_\_\_\_

**Total Shares of Stock:** \_\_\_\_\_

**Mailing Address (if different from above):** \_\_\_\_\_

**Type of Business** \_\_\_\_\_ **No. of Employees** \_\_\_\_\_

**Do you have Payroll Service?** Y \_\_\_ N \_\_\_ **Are you interested?** Y \_\_\_ N \_\_\_

**Client Payment Method:** [ ] Visa [ ] Master Card [ ] American Express [ ]

Check: \_\_\_\_\_

Name on Card \_\_\_\_\_ No. \_\_\_\_\_

MasterCard/Visa CVV No: \_\_\_\_\_ (3 digit credit card number printed on reverse side of card)

Exp. \_\_\_\_\_ **IMPORTANT:** Street Number \_\_\_\_\_ and Zip Code \_\_\_\_\_

of cardholder's mailing address if different from Billing information above.

Notes: NEW ENTITY [ ] Scorp [ ] Prof Corp [ ] CLEAN UP [ ]

REGULAR FILING [ ] EXPEDITE [ ]: Additional fees are required

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