

HOW HEALTHY IS YOUR ENTITY? A BUSINESS "WELLNESS" CHECKLIST

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| Have initial filings been made? | <input type="checkbox"/> Fictitious Name Registration
<input type="checkbox"/> Articles of Incorporation
<input type="checkbox"/> EIN/TIN Application | <input type="checkbox"/> LLP Registration
<input type="checkbox"/> LLC Certificate of Organization
<input type="checkbox"/> Subchapter "S" Election |
| Are all required filings up-to-date? | <input type="checkbox"/> Fictitious Name Registration
<input type="checkbox"/> Decennial Filing
<input type="checkbox"/> Amendments to Articles of Incorporation | <input type="checkbox"/> Annual LLP Registration
<input type="checkbox"/> Change of Registered Address |
| Do you have / do you need to update: | <input type="checkbox"/> Fictitious Name Registration
<input type="checkbox"/> Bylaws
<input type="checkbox"/> Corporate/Shareholder Buy-Sell Agreements | <input type="checkbox"/> Partnership Agreements
<input type="checkbox"/> LLC Operating Agreements |
| Are corporate records up-to-date? | <input type="checkbox"/> Annual Shareholder Meeting Minutes | <input type="checkbox"/> Directors Meeting Minutes |
| Are record keeping procedures accurate and adequate? | <input type="checkbox"/> Corporate Records
<input type="checkbox"/> Personnel Records
<input type="checkbox"/> Business Records | <input type="checkbox"/> Real Estate Records
<input type="checkbox"/> Tax Records
<input type="checkbox"/> Personal Records |
| When was your last: | <input type="checkbox"/> Shareholders meeting | <input type="checkbox"/> Directors meeting |
| Are your legal and financial advisors aware of: | <input type="checkbox"/> Personal matters that might affect business concerns | <input type="checkbox"/> Business matters that might affect personal concerns |
| Are your bookkeeping procedures and records: | <input type="checkbox"/> Accurate
<input type="checkbox"/> Complete | <input type="checkbox"/> Consistent
<input type="checkbox"/> Reviewed |
| Do you have a Business Succession Plan? | <input type="checkbox"/> Yes <input type="checkbox"/> No | Is it up-to-date? <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Are your Estate Planning Documents: | <input type="checkbox"/> Up-to-date | <input type="checkbox"/> Adequate for your business needs
<input type="checkbox"/> Adequate for your personal need |