



# LLC Formation Assessment

New Assessment Questionnaire Submission

## 01. Applicant Profile

|                      |                     |
|----------------------|---------------------|
| Applicant Name       | [applicant-name]    |
| Email Address        | [applicant-email]   |
| Country of Residence | [country-residence] |
| Applicant Status     | [applicant-status]  |

A. U.S. Resident Information

|                            |                              |
|----------------------------|------------------------------|
| Current State              | [current-state]              |
| Primary Business Operation | [business-operation]         |
| Multiple States            | [multiple-states]            |
| International Countries    | [international-countries]    |
| Already Operating          | [already-operating]          |
| Current Business Name      | [current-business-name]      |
| Current Entity Type        | [current-entity-type]        |
| Current Registration State | [current-registration-state] |
| Current EIN                | [current-ein]                |
| Business Type              | [business-type]              |
| Other Business Type        | [business-type-other]        |
| Amazon Inventory           | [amazon-inventory]           |
| Property Locations         | [property-locations]         |
| SaaS Investors             | [saas-investors]             |

## **B. Non-U.S. Resident Information**

|                                 |                           |
|---------------------------------|---------------------------|
| <b>Country of Residence</b>     | [nonus-country-residence] |
| <b>Country of Tax Residence</b> | [tax-residence-country]   |
| <b>ITIN</b>                     | [have-itin]               |
| <b>EIN</b>                      | [have-ein]                |
| <b>Existing U.S. Company</b>    | [existing-us-company]     |
| <b>Existing Entity Type</b>     | [existing-entity-type]    |
| <b>Existing Company State</b>   | [existing-company-state]  |
| <b>Year Formed</b>              | [company-year-formed]     |
| <b>Business Type</b>            | [nonus-business-type]     |
| <b>U.S. Office</b>              | [us-office]               |
| <b>U.S. Employees</b>           | [us-employees]            |
| <b>U.S. Inventory</b>           | [us-inventory]            |
| <b>U.S. Contractors</b>         | [us-contractors]          |

## **02. Ownership & Operations**

|                                |                 |
|--------------------------------|-----------------|
| <b>Number of Owners</b>        | [number-owners] |
| <b>Non-U.S. Owner</b>          | [foreign-owner] |
| <b>Employees</b>               | [employees]     |
| <b>Office</b>                  | [office]        |
| <b>Warehouse</b>               | [warehouse]     |
| <b>Inventory</b>               | [inventory]     |
| <b>Independent Contractors</b> | [contractors]   |

03. Financial Expectations

|                          |                  |
|--------------------------|------------------|
| Estimated Annual Revenue | [annual-revenue] |
| Expected Annual Profit   | [annual-profit]  |

04. Banking & Payment Needs

|                            |                     |
|----------------------------|---------------------|
| U.S. Business Bank Account | [business-bank]     |
| Stripe                     | [stripe]            |
| PayPal                     | [paypal]            |
| Payment Processor          | [payment-processor] |

05. Business Priorities

|                        |                          |
|------------------------|--------------------------|
| Highest Priority       | [highest-priority]       |
| Raise Investment       | [raise-investment]       |
| Hire Employees         | [hire-employees]         |
| Expand Internationally | [expand-internationally] |
| Own Real Estate        | [own-real-estate]        |
| Preferred State        | [preferred-state]        |

06. Additional Services Required

|                    |            |
|--------------------|------------|
| Requested Services | [services] |
|--------------------|------------|

07. Recommended Strategy

|                            |                         |
|----------------------------|-------------------------|
| Recommended State          | [recommended-state]     |
| Alternative State(s)       | [alternative-states]    |
| Recommended Entity         | [recommended-entity]    |
| Federal Tax Classification | [tax-classification]    |
| Why This Recommendation?   | [recommendation-reason] |

08. Compliance Considerations

|                             |              |
|-----------------------------|--------------|
| Applicable Compliance Items | [compliance] |
|-----------------------------|--------------|

Tax Square Professional Corporation  
LLC Formation Assessment & Recommendation