

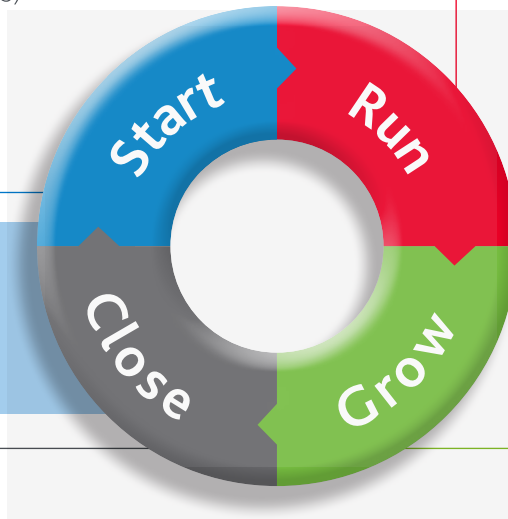
## Entity Compliance by Business Lifecycle exclusively for



### Forming new entity?

- Obtain State IDs
- Appoint Registered Agent
- Conduct Name Availability Check
- File Name Reservation/Registration
- File Articles of Incorporation (Corp.) or Articles of Organization (LLC)
- Apply for Business Licenses and Permits
- File Assumed Name or DBA Certificate
- File for Trademark Protection (if desirable)
- Apply for Employer identification Number (from IRS)
- Order Corporate Records Kit
- Domain Registration (if needed)
- Publication in newspaper (if required by state)

Use the attached chart to check in with your clients and discuss how they are meeting their compliance obligations today.



### Terminating an entity?

- File Articles of Dissolution
- Obtain Tax Clearance Letter (if required)
- File Notice of Intent to Dissolve (if required)
- File Withdrawal of Qualification/Registration AND/OR Evidence of Dissolution or Merger (for each foreign state)
- Cancel Business Licenses and Permits
- File Evidence of Dissolution or Merger
- Cancel Assumed Name or DBA Certificate

### Complying with ongoing responsibilities?

- File Annual Report
- File and Pay Franchise Tax
- File Federal and State Tax Returns
- Renew Business Licenses & Permits
- Renew Assumed Name or DBA Registration
- Independent Director and Corporate Staffing (if needed)

### Changing entity structure?

- Conduct Name Availability Check (if changing name)
- File Name Reservation/Registration (Corp.) or Articles of Organization (LLC)
- File Application for Conversion (if changing entity type)

### Changing Registered Agent?

- File Notice of Change of Registered Agent

### Proving Corporate Existence for Business Transactions?

- Obtain Certificate of Good standing
- Obtain Apostille (if required for foreign country transactions)
- Obtain Certified Copy of Formation Documents

### Expanding Business to Another State or Country? (Foreign Qualification)

- Obtain State Tax IDs
- Conduct Name Availability Check
- File Name Reservation/Registration
- File Foreign Qualification/Registration
- File Assumed Name or DBA Certificate
- Apply for Business Licenses and Permits
- Appoint Registered Agent in Foreign State
- International Filing and Document Retrieval
- Obtain Certificate of Good Standing from Home State

### Merging/Acquiring Another Business? (Survivor Filings)

- Conduct Name Availability Check
- File Name Reservation (if name is being changed)
- File Amendment of Assumed Name or DBA (if needed)
- File Foreign Qualification Documents (see above)
- File Evidence of Merger (in foreign states, if required)

Go to [BizFilings.com](http://BizFilings.com) or call 800-981-7183 for more information