

Entity Compliance by Business Lifecycle exclusively for  **Member Discount Partner**

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)

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

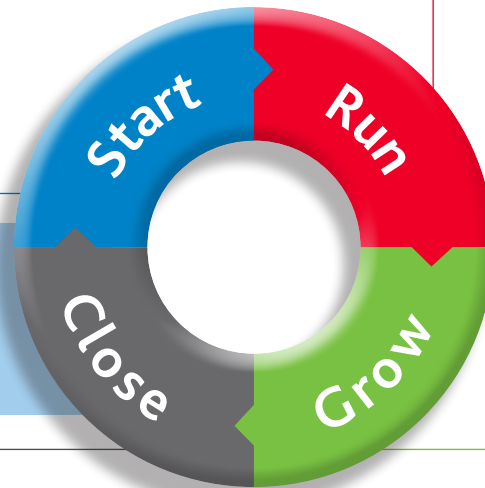
Expanding Business to Another State or Country? (Foreign Qualification)

- 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)

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

Go to BizFilings.com or call 800-981-7183 for more information