

Annual Record Service Questionnaire



CLIENT INFORMATION

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ENTITY INFORMATION

I have a Corporation Only (Complete Section 1) I have an LLC or LP Only (Complete Section 2) I have both a Corp. & LLC/ LP (Complete Both Sections)

SECTION ONE: CORPORATIONS

Corporation Name

Step One: Annual Shareholders Meeting

Meeting Date & Time

Meeting Location

Shareholder	Number of Shares	Type of Shares (Common or Preferred)	Voting/Non-voting

Meeting Chairman Meeting Secretary

Elected Director(s)

Other Actions Taken at Meeting

Step Two: Annual Directors Meeting

Meeting Date & Time

Meeting Location

Directors Present

Meeting Chairman Meeting Secretary

Elect New Officers

New President New Treasurer

New Vice President New Secretary

Additional Resolutions Needed

SECTION TWO: LIMITED PARTNERSHIPS & LLCs

LP/LLC Name

Meeting of Partners/Members

Meeting Date & Time

Meeting Location

Partners/Members Present

Meeting Chairman Meeting Secretary

Who will manage the LP or LLC?

- Managed by a Person Managed by an Entity Managed by the Members (LLC)

Name of Manager(s)/GP(s)

LPs are Managed by a General Partner (GP) – LLCs can be Member-Managed or Manager-Managed

**FAX THE COMPLETED QUESTIONNAIRE TO 702-664-0549
or EMAIL TO: minutes@andersonadvisors.com**