

# LIMITED PARTNERSHIP (LP)

## Next Steps To Forming Your Anderson Entity

- We will reach out to you soon to discuss the setup of your Limited Partnership.
- This document is intended to serve as a guide to prepare you for the call.
- Reviewing this document will inform you of what information we need so you can be prepared.

### Client Information

We will need the name and contact information of the client who contracted with Anderson Advisors in case we have any questions. This includes the client's Social Security Number for the Limited Partnership's tax filings. This information is not public and will not be shared.

1. Client Name: \_\_\_\_\_
2. Phone #: \_\_\_\_\_ Email: \_\_\_\_\_
3. Client SSN: \_\_\_\_\_

### Purpose of Limited Partnership

The purpose of the Limited Partnership tells us what appropriate language to use when drafting the partnership agreement.

4. The LP will be used to hold: (briefly describe)

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### Name/Alternative Name

Now is your opportunity to name your Limited Partnership. We recommend having an alternative in case your preferred name is not available.

#### Here are some tips to think about when selecting a name:

- Try to avoid commonly used words, names, and landmarks because these may already be in use.
- If you want to use common words, adding a second word, such as Management, Capital Management, or Resources, will usually create sufficient uniqueness. We recommend you avoid the words Consultant, Investment, Holding, Mutual, or Funding.
- Do not include your personal name or initials. Using a personal name will jeopardize your anonymity and expose your assets.
- In most states, an entity designator (LP or Limited Partnership) is required to conduct business as an LP.
- If you want to build an online presence, go to GoDaddy.com to see if an associated web address is available.

5. LLC Name: \_\_\_\_\_
6. Alternative Name: \_\_\_\_\_
- Is the LLC for professional service: ☐ Yes ☐ No If yes, what type? \_\_\_\_\_

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Filing State

Use the two-letter designation for the state where we will be filing your Limited Partnership. If you are contracted to have your Limited Partnership filed in multiple jurisdictions or foreign filed, please indicate that.

7. Filing State: \_\_\_\_\_ Will this be filed in another state as well? ☐ Yes ☐ No If yes, where? \_\_\_\_\_

Business Address

Please provide a business address for your Limited Partnership. You should use an address in the same state that is listed as your Filing State. If you have our Company Assistance Program and would prefer to use our virtual business address, check the box.

If the Limited Partnership is being foreign filed in other states, we will need the business address for each state. Attach a separate page if necessary.

You may not use a P.O. Box; you must provide a physical address.

8. Please provide a business address for your corporation.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

If you have our Company Assistance Program and would prefer to use our virtual business address check the box.

☐ Yes, use Anderson’s Virtual Business Address

General Partner

Limited Partnerships are required to have a General Partner (the Manager). The General Partners in Limited Partnerships we create are typically corporations. If you have contracted to have us create a corporation, write “My Corporation” in the space provided. Or fill out the information of the General Partner. If the General Partner is an existing corporation, please include the Employer Identification Number (EIN). You should also include the Ownership Percentage of the General Partner. For example, if you have two partners with equal ownership, the Ownership Percentage would be 50%.

9. General Partner: (if general partner is an existing corporation, include EIN #)

Name: \_\_\_\_\_

SSN or EIN: \_\_\_\_\_

Address: \_\_\_\_\_ Ownership % \_\_\_\_\_

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## Limited Partners

A Limited Partnership should have at least one Limited Partner (non-managing partner). Please include the contact information, Social Security Number, and Ownership Percentage for each Limited Partner.

### 10. Limited Partners

Name: _____	Name: _____
SSN: _____	SSN: _____
Address: _____	Address: _____
_____ Ownership %	_____ Ownership %

Name: _____	Name: _____
SSN: _____	SSN: _____
Address: _____	Address: _____
_____ Ownership %	_____ Ownership %

## Next Steps

Next steps once we have all the information requested:

These fees will vary based on the state of formation and will be collected at the time of filing. Generally speaking, these fees will be less than \$400. Your binder will be shipped to the shipping address on file.

We will be here to support you!