

# Series Limited Liability Company Questionnaire

(See page 3 for instructions.)

## CLIENT INFORMATION

1. Client Name:

2. Contact Info: *Phone*   
*Email*

3. Client SSN:

Washington  
732 Broadway, Suite 201  
Tacoma, WA 98402  
Fax: 253.238.0003

Nevada  
3225 McLeod Drive  
Las Vegas, NV 89121  
Fax: 702.664.0549

800.706.4741  
www.andersonadvisors.com

## PURPOSE OF LLC

4. The LLC will be used to hold:      *Rental*       *Flips*       *Other*

5. If other, briefly describe:

6. Will this LLC be assigned an interest in a Land Trust?      Yes       No

## MASTER LLC INFORMATION

7. LLC Name:

8. Alternate Name:

9. Is this LLC for a professional service:      Yes       No       *If yes, what type?*

10. Filing State:       11. CAP? Do you subscribe to the Corporate Assistance Program?      Yes       No   
If yes, Anderson can provide a business address for you.

12. Will this be filed in another state as well?      Yes       No       *If yes, where?*

13. How many cells will you need upon formation?

14. Will all of the cells hold real estate?      Yes       No

15. LLC Address: *(List physical address of each jurisdiction where filed—do not enter P.O. box.)*

16. Resident Agent to be provided by Anderson unless you notify us otherwise.  
*See Instructions for more information on the Resident Agent.*

17. The LLC will be:      *Manager-Managed*       *Member-Managed*       *\*Note: Rental LLCs Should be Member-Managed*

18. The manager is a(n):      *Entity*       *Person*

## MANAGER & MEMBER INFORMATION

19. Manager Name: (If we are creating a corporation that will act as Manager, write "Client Corp." If using an existing corporation as manager, please also list the President, i.e. ABC, inc. – Joe Smith, President.)

20. Manager Address: CAP? Yes  No

21. Who will serve as President on behalf of the Series LLC?:

22. LLC Tax Status: Disregarded  C-Corporation  S-Corporation  Partnership

23. Members:

Name:	
SSN:	
State of residence or formation:	
Ownership %:	

Name:	
SSN:	
State of residence or formation:	
Ownership %:	

Name:	
SSN:	
State of residence or formation:	
Ownership %:	

Name:	
SSN:	
State of residence or formation:	
Ownership %:	

## SERIES CELL DETAILS

24. Cell Name:

\_\_\_\_\_

Cell Purpose:

*Rental*

*Flip*

*Other*

\_\_\_\_\_

Property Address:

\_\_\_\_\_

Manager(s):

\_\_\_\_\_

Member(s):

\_\_\_\_\_

25. Cell Name:

\_\_\_\_\_

Cell Purpose:

*Rental*

*Flip*

*Other*

\_\_\_\_\_

Property Address:

\_\_\_\_\_

Manager(s):

\_\_\_\_\_

Member(s):

\_\_\_\_\_

26. Additional Properties:

## INSTRUCTIONS

- Question 1: The name of the client who contracted with Anderson.
- Question 2: Contact information in case we have questions.
- Question 3: We need your social security number for the tax filings. This is not a public record.
- Question 4: This lets us know the purpose behind the LLC so that we can draft appropriate language in the operating agreement.
- Question 5: Give a general description of the business of the LLC if it is not to hold brokerage accounts or real estate.
- Question 6: A common real estate strategy is to use a land trust wherein the beneficial interest is held inside, or assigned to, an LLC. Let us know if that is the case.
- Question 7: Now is your opportunity to name your LLC. If you have more than one LLC, please use a separate questionnaire for the other name choices. It is recommended that you avoid using family names. Common words are usually already taken; however, adding a second word such as Management, Capital Management, or Resources, will usually create sufficient uniqueness for your name. Do not use the words Consultant, Investment, Holding, Mutual or Funding in your name. In most states, an entity designator (LLC or Limited Liability Company) is required to conduct business as an LLC.
- Question 8: We need more than one name in the event your first choice is already in use.
- Question 9: If the LLC is going to be engaged in law, architecture, engineering, medical, accounting or other professional services, check this box and state which profession the corporation is going to be engaged in (we may need copies of licenses, etc.)
- Question 10: Use the two letter designation for the state where we will be filing your LLC. If you are registering your LLC in more than one state, you will have the opportunity to indicate where it is to be filed in a later question.
- Question 11: Did you contract to use BOSS services for this entity? BOSS is an office suite provider in Nevada for use with Nevada entities.
- Question 12: If you are having more than one LLC set up and the information is the same for the LLCs, let us know and we can save you the trouble of filling out the same information twice. Let us know the name of the LLC you want us to look to for answers.
- Question 13: Let us know how many cells we need to prepare with your master LLC. If you are setting up your LLC to hold 4 properties then enter one cell for each property i.e., 4.
- Question 14: We need to know if each cell will only hold real estate or perform some other function. If you select no we will contact you to discuss.
- Question 15: This should be an address in the same state that is listed in Question 10. If you are using BOSS, write "BOSS" in the space provided. If the LLC is being foreign filed in other states, we will need the business address for each state. Attach a separate page if necessary.
- Question 16: All states require a business entity to have a Resident (Registered) Agent (someone to accept service of process within the state). Anderson will provide a Resident Agent for you unless you indicate otherwise. Anderson highly recommends you do not serve as your own Resident Agent to ensure timely filings of your annual renewals with your state of incorporation. If you reside in the state in which your entity is formed, and you want to assume this responsibility, you may act as the Resident Agent.
- Question 17: LLCs are either Manager-Managed (the manager can be a third party or entity) or Member-Managed (managed by the owners). We rarely recommend Member-Managed as it imposes unnecessary limitations on the LLC.
- Question 18/ 19: Indicate the form of the Manager and the Manager's name.
- Question 20: Tell us the Manager's address. If the Manager is your corporation, write "My corp" in the space provided
- Question 21: This person is appointed to sign on behalf of the series for banking and other related transactions when managing the business.
- Question 22: Let us know how the LLC is going to be taxed. A Husband and Wife in a community property state (AZ, CA, ID, LA, NV, NM, TX, WA, and WI) can be considered a "single person" for purposes of filing the LLC as "Disregarded" (i.e. no tax return due).
- Question 23: List the owner(s) of the LLC (the member(s)) and their address(es).