



Alexandria Kincaid
Attorney
Founder / Owner of
Alex Kincaid Law
Alex@AlexKincaidLaw.com

4401 N. Eagle Road, Suite #102
Boise ID 83713

Phone: 208-345-6308
Alex@AlexKincaidLaw.com

Alex Kincaid Law and our partners provide our business clients with a ***complimentary initial risk assessment***. This assessment requires that we review your current business documents and practices. Our risk analysis will inform you of your potential exposure areas and our recommendations for improving your business practices. ***Our goal is to minimize our clients' exposure to litigation and to create bullet-proof planning that will limit their liability from creditors and predators.*** An ounce of planning is worth a pound of cure.

Our initial review includes a 30 minute discovery meeting and includes the following areas:

- Company ownership and management structure
- Governing documents
- Ownership transfer restrictions
- Current business litigation
- Insurance issues
- Business Continuity Planning
- Supply Chain Risk
- Major business actions
- Advisor information
- Assets used in business operations
- Current personal litigation
- Employee issues

Our team of professionals will provide you with a Risk Reduction Implementation Plan. You may choose to implement any of our recommendations at any time, but you are under no obligation. In order to be able to address these items properly, we need to know a little about your company. Therefore, please take a few minutes and complete all applicable information as completely as possible. If you do not have all of the requested information, please provide what you have available – it is better to get started than to delay because of missing documents (many small businesses do not have all of the requested information).

Basic Business Information:

Business name: _____

Doing business as: _____

Date formed or filed: _____ State filed: _____

Primary business activity: _____

Business address: _____

Business Phone / Fax: _____

Primary contact, address, and phone numbers: _____

Alternate contact, address, and phone numbers: _____

Other business locations: _____

Accountant Name / Phone: _____

Insurance agent Name / Phone: _____

Other business advisor Name / Phone: _____

Other business advisor Name / Phone: _____

Would you like a referral for any of the above professionals? _____

Approximate net worth of the business: _____

Gross receipts for last calendar year: _____

Expected gross receipts for current calendar year: _____

Ownership Information:

List of current owners and ownership interest:

Name	Ownership %	Title	Active or Passive

Business Administration:

When was your last business meeting? _____

What is the date of your last written minutes of business meetings? _____

Who regularly updates your business records and files your periodic reports? _____

Current liabilities against business assets:

Legal form of existing business: Corp / LLC / Partnership / Sole Proprietorship (circle one)

Tax structure of existing business:

S Corporation / C Corporation / Partnership / Subchapter K / Disregarded Entity (circle one)

Business Operations:

Number of employees, subcontractors, etc.: _____

Who are your key employees?

What major contracts do you have in place?

Business Documents

Please provide all of the following that you have available:

Operating & Ownership Agreement (Depending on state of organization and type of entity, may be Articles or a Certificate of Organization, By-Laws, Operating Agreement, Partnership Agreement)

Last meeting minutes or resolutions if available

Asset list

Tax returns for last two years

Most current profit and loss statement or balance sheet

Management structure (use back of this sheet if necessary)

Any business succession / continuity plan (Buy-Sell)