

Client Intake Checklist

Provided by Strengthening Pathways Consulting, LLC

- LLC Formation Checklist

- ☐ Desired business name (must be unique in your state)

- ☐ Full legal name

- ☐ Business address (no P.O. Boxes)

- ☐ Registered Agent (yourself or someone else?)

- ☐ State where you want your LLC formed

- ☐ Type of business or services you'll provide (short description)

- ☐ Whether this is a single-member LLC or has multiple members

- ☐ Names and contact info for any other members (if applicable)

- ☐ Email and phone number

- ☐ Payment for your states filing fee (I'll let you know the amount)

- 501(c)(3) Nonprofit Checklist

- ☐ Desired nonprofit name (must be unique in your state)

- ☐ Mission statement what your organization does and who it serves

- ☐ Description of your programs/services

- ☐ State where you're incorporating

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- ☐ Business address (must be a real U.S. address)
- ☐ Names and roles of at least 3 board members (President, Secretary, Treasurer)
- ☐ Contact info for board members
- ☐ Preferred IRS application type (Ill help you decide: Form 1023 or 1023-EZ)
- ☐ Estimated 3-year budget or income/expenses (Ill guide you through it)
- ☐ Payment for IRS fee (\$275 for EZ, \$600 for full form)
- ☐ EIN (Ill apply for it)
- ☐ Bylaws (I will create these for you)
- ☐ Articles of Incorporation (Ill prepare and file)

- Essentials Bundle Checklist

- ☐ Full name and contact info
- ☐ Resume information (job history, education, skills, etc.)
- ☐ Any existing resume (optional, I can work from scratch)
- ☐ Type of job or field youre targeting
- ☐ Preferred email handle for your new professional email

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- ☐ Email provider preference (Gmail or Outlook)
- ☐ Reason for the business/personal letter (job app, client outreach, etc.)
- ☐ Details you'd like mentioned in the letter (strengths, tone, faith, goals)

- Startup Bundle Checklist

- ☐ Business name
- ☐ Business description what you do, who you serve
- ☐ Full name, phone, email
- ☐ Business address
- ☐ EIN application details (Ill guide you just need name, SSN, business purpose)
- ☐ State for LLC registration
- ☐ Single-member or multiple-member LLC
- ☐ Registered Agent info (you or someone else)
- ☐ Website info (tagline, about me, services, logo/photos, domain)
- ☐ Payment for state filing fee (Ill confirm your states fee)

- Optional Add-Ons

- ☐ Operating Agreement (for LLCs recommended)

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☐ Digital or print delivery of all final documents

☐ Business bank account setup help

☐ Grant or funding search assistance (for nonprofits)

☐ Custom domain & branded email help

☐ Grace-Based Pricing available (ask me if needed)