

# Confidential Business Start-Up Information Questionnaire

It is advisable that you seek the counsel and representation of an experienced business law attorney to help you through the process of launching your business venture. In order to do the best possible job on your behalf, your attorney needs information about the business venture and the entrepreneur(s). At your first meeting with your attorney, you should be prepared to provide, as applicable, the following information:

## INFORMATION ABOUT YOU

Name \_\_\_\_\_

Date of Birth \_\_\_\_\_

Home Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Business Address

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Home Phone Number \_\_\_\_\_

Work Phone Number \_\_\_\_\_

Other Phone Number \_\_\_\_\_

Facsimile Number \_\_\_\_\_

E-mail Address \_\_\_\_\_

Web Site Address \_\_\_\_\_

Have you ever declared bankruptcy, been accused, convicted or found liable for any violation of a federal or state securities law or regulation, or entered into a consent decree with, or had an injunction granted against you by, any federal or state enforcement agency or commerce department? \_\_\_\_\_ (If yes, provide details)

## INFORMATION ABOUT YOUR EMPLOYMENT

Present Employer \_\_\_\_\_

Employment Position \_\_\_\_\_

How long have you worked there? \_\_\_\_\_

Do you intend to remain employed there? \_\_\_\_\_

If yes, for how long? \_\_\_\_\_

Did your current employer or any past employer require you to sign a noncompetition or confidentiality agreement?  
\_\_\_\_\_ (If yes, provide a copy of the agreement to your attorney)

Did you develop your business concept on company time or premises? \_\_\_\_\_

Did you use any company resources in developing your business concept? \_\_\_\_\_

If yes, what resources? \_\_\_\_\_

Have you approached your employer with your business venture? \_\_\_\_\_

If yes, what was your employer's response? \_\_\_\_\_

**INFORMATION ABOUT YOUR BUSINESS PARTNER(S)**

(Your business partners, if any, should provide the same information you have provided above)

**INFORMATION ABOUT YOUR BUSINESS VENTURE**

Have you taken any steps to incorporate your business? \_\_\_\_\_ (If yes, provide details)

Who is expected to initially own the business, in what percentages, and for what contributions?

<u>Owner</u>	<u>Percentage of Ownership</u>	<u>Contribution</u>
_____	_____	_____
_____	_____	_____

Which of the owners are expected to be employed by the business? \_\_\_\_\_

In what capacities? \_\_\_\_\_

For what compensation? \_\_\_\_\_

Are there any written contracts between the owners? \_\_\_\_\_ (If yes, provide your attorney with a copy)

Do you have a written Business Plan? \_\_\_\_\_ (If yes, provide your attorney with a copy of it)

Have you offered to sell or sold any interests in your business to any investors? \_\_\_\_\_ (If yes, provide details)

Have you obtained or sought to obtain any loans for your business? \_\_\_\_\_ (If yes, provide details)

Have you retained any consultants, accountants, or tax professionals? \_\_\_\_\_ (If yes, provide details)

Have you promised an interest in the company to any consultants? \_\_\_\_\_ (If yes, provide details)

What assets does the business own? \_\_\_\_\_

Do you, any of your partners, or the business own any inventions the business intends to exploit? \_\_\_\_\_ (If yes, provide

details)

Is the business a party or potential party to any joint venture, license, or similar agreement? \_\_\_\_\_ (If yes, provide your attorney with a copy)

Does the business have any trademarks or logos you wish to protect? \_\_\_\_\_ (If yes, provide details or renderings)

Does the business own or lease any real estate? \_\_\_\_\_ (If yes, provide details)

Does the business have any written financial statements? \_\_\_\_\_ (If yes, provide your attorney with a copy)

**OTHER QUESTIONS**

(Make a list of other pertinent questions to ask your attorney)