

YORKHOWELL

ATTORNEYS AT LAW

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SALT LAKE CITY, UTAH 84121

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BUSINESS PLANNING DATA SHEET

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Name: _____

Mailing address: _____

Phone Number: _____ E-Mail Address: _____

Investment Advisor: _____ CPA/Accountant: _____

Referred by: _____

BUSINESS(ES) OWNED

1. _____

_____	_____
Name of Entity	State of Domicile
_____	_____
Taxation (Disregarded/Partnership/"S" or "C" Corp)	Current Buy Sell (Yes/No)
_____	_____
Business Purpose	

Managers/Directors/Officers	

Managers/Directors/Officers	
_____	_____
Member/Shareholder/Owner	Percentage Ownership
_____	_____
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_____	_____
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_____	_____
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