

Preparing to Meet with Your Business Law Attorney

As you prepare for your first meeting with your business law attorney, you should gather certain documents and information to bring with you. The information you provide will help your attorney to analyze your business needs and create a plan that will best meet your business goals. The following list can help you decide what information to bring. Not all items listed may apply to your situation, and your attorney may ask you for additional documents that are not on this list. If you do not have some of these documents, your attorney can assist you to obtain them.

Business Information

- Business plan including business model
- Business name registration documents
- Any existing business organization documents
- Licensing and permits
- Marketing plans and samples

Financial Information

- Business accounting books
- Individual income tax returns for the past three to five years (state and federal)
- Business income tax returns for the past three to five years (state and federal)
- List of business debts and assets
- Business bank statements

Property Information

- Leases for business space or equipment
- Deeds and titles to business real property and business assets
- Property insurance documents

Bills and Outstanding Debt

- Business credit card statements
- Loan documents
- Utility bills
- Monthly budget worksheet

Legal Agreements

- Supplier contracts
- Contracts with customers

Finally, you will also want to start thinking about other issues that may affect your business. You may wish to speak with your attorney about the following:

- Tax considerations for the business
- Tax considerations for you as an individual
- Your comfort level with business and legal risks

Personal liabilities and assets



Copyright © 2008 FindLaw, a Thomson Reuters business

DISCLAIMER: This site and any information contained herein are intended for informational purposes only and should not be construed as legal advice. Seek competent counsel for advice on any legal matter.