Lancaster LAW BLOG
LANCASTER'S LEGAL LINK

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HOW HEALTHY IS YOUR ENTITY?
A BUSINESS "WELLNESS" CHECKLIST

Have initial filings been made?	__ Fictitious Name Registration __ Articles of Incorporation __ EIN/TIN Application	__ LLP Registration __ LLC Certificate of Organization __ Subchapter "S" Election
Are all required filings up-to-date?	__ Fictitious Name Registration __ Decennial Filing __ Amendments to Articles of Incorporation	__ Annual LLP Registration __ Change of Registered Address
Do you have / do you need to update:	__ Fictitious Name Registration __ Bylaws __ Corporate/Shareholder Buy-Sell Agreements	__ Partnership Agreements __ LLC Operating Agreements
Are corporate records up-to-date?	__ Annual Shareholder Meeting Minutes	__ Directors Meeting Minutes
Are record keeping procedures accurate and adequate?	__ Corporate Records __ Personnel Records __ Business Records	__ Real Estate Records __ Tax Records __ Personal Records
When was your last:	__ Shareholders meeting	__ Directors meeting
Are your legal and financial advisors aware of:	__ Personal matters that might affect business concerns	__ Business matters that might affect personal concerns
Are your bookkeeping procedures and records:	__ Accurate __ Complete	__ Consistent __ Reviewed
Do you have a Business Succession Plan?	__Yes __No	Is it up-to-date? __Yes __No
Are your Estate Planning Documents:	__ Up-to-date	__ Adequate for your business needs __ Adequate for your personal need