



**CORPORATION FORMATION PACKAGE**

- Name Reservation
- Corporate Book
- Articles of Incorporation
- Bylaws
- Organizational Minutes
- Corporate Seal
- Printed Stock Certificates
- Stock Transfer Ledger

**LIMITED LIABILITY COMPANY FORMATION PACKAGE**

- Name Reservation
- LLC Record Book
- Articles of Organization
- Operating Agreement
- Company Seal
- Printed Membership Certificate
- Membership Interest Ledger

**FORMATION PACKAGE**

<input type="checkbox"/> CORPORATION	\$2,750	Quantity	Total
<input type="checkbox"/> LLC	\$2,750	Quantity	Total

Document Signing Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_  
 Document Signing Time: \_\_\_\_\_  
 Deposit Amount: \$ \_\_\_\_\_  
 Total Price: \$ \_\_\_\_\_

**DOCUMENT FILING SERVICES**

<input type="checkbox"/> CORPORATION STATEMENT OF INFO	\$85*
<input type="checkbox"/> ARTICLES OF INCORPORATION	\$545*
<input type="checkbox"/> CORPORATE TERMINATION	\$275*
<input type="checkbox"/> LLC ARTICLES OF ORGANIZATION	\$545*
<input type="checkbox"/> LLC STATEMENT OF INFORMATION	\$85*
<input type="checkbox"/> LLC DISSOLUTION	\$275*
<input type="checkbox"/> RESIGNATION OF AGENT FOR SERV OF PROC	\$195*

\* PLUS SEC. OF STATE FEES

**DOCUMENT RETRIEVAL SERVICES**

<input type="checkbox"/> CA CORPORATION CERTIFICATE OF STATUS/GOOD STANDING	\$150*
<input type="checkbox"/> CA CORPORATE STATUS REPORT	\$175*
<input type="checkbox"/> COPY / CA ARTICLES OF INCORPORATION	\$75*
<input type="checkbox"/> COPY / CA LLC ARTICLES OF ORGANIZATION	\$75*
<input type="checkbox"/> COPY / STATEMENT OF OFFICERS	\$75*
<input type="checkbox"/> COPY / STATEMENT OF INFORMATION	\$75*

\* PLUS SEC. OF STATE FEES

**MISCELLANEOUS SERVICES**

	Hourly Rate
<input type="checkbox"/> REVIEW OF ENTITY DOCUMENTS	
<input type="checkbox"/> NAME CHECK	\$50
<input type="checkbox"/> NAME RESERVATION	\$50
<input type="checkbox"/> STATUS CHECK	\$50
<input type="checkbox"/> LLC ASSIGNMENT	\$275
<input type="checkbox"/> CORPORATE ASSIGNMENT	\$275
<input type="checkbox"/> AGENT FOR SERVICE OF PROCESS	\$275
<input type="checkbox"/> NEW CORP BOOK	<input type="checkbox"/> BASIC \$275 <input type="checkbox"/> DELUXE \$475
<input type="checkbox"/> NEW LLC BOOK	<input type="checkbox"/> BASIC \$275 <input type="checkbox"/> DELUXE \$475
<input type="checkbox"/> BILL OF SALE	\$275
<input type="checkbox"/> BUY-SELL AGREEMENTS	\$2,850
<input type="checkbox"/> PROMISSORY NOTES	\$495
<input type="checkbox"/> HOLD HARMLESS AGREEMENTS	\$1,495
<input type="checkbox"/> BOARD OF DIRECTORS MEETING	\$395
<input type="checkbox"/> MINUTE PREPARATION	\$395
<input type="checkbox"/> STOCK CERTIFICATE LEDGER PREP	\$495
<input type="checkbox"/> MEMBERSHIP CERTIFICATE LEDGER PREP	\$495
<input type="checkbox"/> CORPORATE SEAL	<input type="checkbox"/> COMPANY SEAL
<input type="checkbox"/> STOCK CERT	<input type="checkbox"/> MEMBERSHIP CERT
<input type="checkbox"/> OTHER _____	\$ _____

Client's Name(s): \_\_\_\_\_, request(s) that Citadel Law Corporation complete the documents and services indicated above. The client(s) agree(s) to pay the **TOTAL PRICE**, as may be adjusted by the attorney together with a required **DEPOSIT**. If deposit amount is left blank, one-half of the total price will be charged as the deposit. The total price may vary depending on the actual work completed by the attorney. Rush fee of \$200 will apply if work required in less than 14 business days. The above prices are approximations only and may vary from case to case, according to the attorney's judgement. I have read, understand and agree with all of the terms on the front and back of this form (*all clients must initial here*): \_\_\_\_\_.

I hereby authorize the use of my credit card for the deposit amount and any remaining balance upon completion of work. Credit Card Number: \_\_\_\_\_, Type: \_\_\_\_\_, Exp. Date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

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 Client Date  
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 Client Date

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 CCEP Signature: Date  
 \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 CCEP Print: Date  
 \_\_\_\_\_/\_\_\_\_\_/\_\_\_\_\_  
 Attorney Date

## Citadel Law Corporation Disclosure Agreement

**1. Citadel Law Corporation:** Citadel Law Corporation, (hereafter "Citadel Law") is an independent estate and business planning law firm. Attorneys at Citadel Law counsel each client regarding all of the business planning options which are appropriate for that client and the pros and cons of each option. Citadel Law' attorneys also design and draft each business document. Citadel Law' attorneys are responsible for determining which type of business entity, if any, would be most appropriate for the client, and which business planning techniques should be used to best accomplish each client's objectives. Citadel Law does not rely on any particular client or firm for employment. For married couples, if the attorneys at Citadel determine that representing both spouses would constitute a conflict in interest, then Citadel may elect to represent only one spouse, and require that the other find independent legal counsel.

**2. Attorney Consultations and Telephonic Consultations:** Each client has the right to personally visit with and consult directly with an attorney at Citadel Law at any time concerning the creation or maintenance of their business entity or estate plan. Each client that establishes a business entity through Citadel Law may call, meet, or consult with an attorney at Citadel Law regarding any matter related to their business entity or estate plan at any time at no additional charge. Unless the client specifically requests an appointment to personally visit with an attorney, by signing this agreement the client hereby requests and authorizes an attorney at Citadel Law to telephone the client at his or her home or place of business for purposes of conveniently answering the client's questions, discussing relevant issues related to the client's estate plan, and gathering, providing and verifying information which the client, the attorney or the CCEP believes is important and necessary for the proper completion of the client's business entity and estate plan.

**3. Certified Citadel Estate Planner (CCEP) Participation:** A CCEP is a specially trained paralegal who has been instructed by and works under the supervision of the attorneys at Citadel. A CCEP does not engage in the practice of law, but does gather copies of grant deeds, tax bills, existing trusts or wills, tax returns, corporation, LLC or business records, insurance policies, retirement plans, or other family, business and financial data necessary for the proper completion of a client's estate plan. A CCEP may also discuss the general advantages of proper estate and business planning. The client hereby authorizes the CCEP to gather any information necessary for the proper completion of the estate and/or business plan. Each client has the right to meet personally with an attorney regarding any issue which affects his or her estate and/or business plan. However, unless the client specifically requests to meet with an attorney, the client hereby requests and authorizes the CCEP to deliver and notarize the business documents, grant deeds or other estate planning documents which have been prepared by the attorney.

**4. Disclosure and Use of Personal and Financial Client Information:** Citadel Law recognizes the importance of privacy and under the law of attorney-client privilege cannot disclose any of the client's personal or financial information to any person other than the Citadel attorneys or the client's CCEP paralegal. The client also authorizes the CCEP or Citadel Law to use the client's personal and/or financial information to prepare estate planning documents, business documents, presentations or illustrations for the client concerning the client's overall estate and business plan. Citadel Law will not disclose any confidential information to a client's family members or other third parties without the client's permission. Client agrees to provide Citadel Law and the CCEP with any information necessary for the proper completion of the estate and/or business plan and holds Citadel Law and the CCEP harmless for any damages that may result from the client's failure to accurately or completely provide such information. Client understands that it is client's responsibility to transfer assets into his or her business entity and hereby holds Citadel Law harmless for any damages relating to the client's failure to properly fund his or her entity.

**5. Authorization for Attorney Fees and Paralegal Fees:** The client understands that the total fee for a business plan includes the attorney's legal fee as well as established compensation for the paralegal. The client hereby requests and authorizes Citadel Law to pay a paralegal fee directly to the CCEP for the time, expense and effort that the CCEP expends in gathering or delivering information or documentation necessary to or prepared by the attorneys at Citadel Law for the completion of the client's business entity or estate plan. The client understands that the CCEP's paralegal fee may be construed as a conflict of interest, but by signing this agreement the client expressly authorizes the CCEP to receive compensation as a paralegal from Citadel Law.

**6. Free Document Review Period:** From the time a client's documents are signed and delivered the client has a 30-day period to request any changes or corrections at no charge. Document revisions after 30-days may require an amendment and will be completed for a fee.