

## **STAGES IN THE LIFE OF A BUSINESS (and its owners)**

1. PRE-FORMATION
  1. Counseling
  2. Confidentiality Agreement
  
2. FORMATION
  1. Choice of entity
    1. Corporation (“S” or “C”)
    2. LLC
    3. Partnership
    4. Sole Proprietorship
  2. Assignment and Assumption Agreement
  3. Shareholders’/ Operating Agreement
  
3. ONGOING OPERATION
  1. Agreements
    1. Contracts—Subject-Specific
    2. Employment
    3. Nonsolicitation / Noncompete
    4. Leases
    5. Loans
    6. Stock Purchase/ Redemption
  2. Trademark Applications
  3. State Tax Issues
  4. Certification as Minority, Women, or Small Business Enterprise
  5. Ongoing Corporate Maintenance
    1. Corporate Record Books
    2. Qualification to Do Business in Other States
    3. Registered Agent Service
  
4. EXPANSION/ CONTRACTION/ CHANGE
  1. Asset Purchase Agreements
  2. Mergers/ Joint Ventures
  
5. CONCLUSION
  1. Dissolution/ Winding Up
  2. Sale
  3. “Natural Death”
  
6. PERSONAL (whether or not related to Corporate/ LLC existence)
  1. Real Estate Purchases and Sales
  2. Federal or State Tax Issues/ Representation
  3. Wills