



2. CAPITALIZATION

2.1 Aggregate initial equity investment \$ \_\_\_\_\_  
2.2 Initial indebtedness (Secured) \$ \_\_\_\_\_  
(Unsecured) \$ \_\_\_\_\_

3. FINANCES

3.1 Contributions \_\_\_\_\_  
3.2 Allocations of Profits and Losses \_\_\_\_\_  
3.3 Distributions: Actual \_\_\_\_\_  
Interim \_\_\_\_\_  
Dissolution \_\_\_\_\_

4. ORGANIZERS/MEMBERS OF LLC

4.1 Name and Address \_\_\_\_\_  
\_\_\_\_\_

Become a member of LLC? \_\_\_ Yes \_\_\_ No  
Active in exercising control in LLC? \_\_\_ Yes \_\_\_ No, may be Membership Interests  
as Securities

Capital Contributions \_\_\_\_\_  
Obligation(s) in addition to contributions \_\_\_\_\_  
Provisions relating to capital accounts and their maintenance \_\_\_\_\_

Percent of Ownership \_\_\_\_\_

4.2 Name and Address \_\_\_\_\_  
\_\_\_\_\_

Become a member of LLC? \_\_\_ Yes \_\_\_ No  
Active in exercising control in LLC? \_\_\_ Yes \_\_\_ No, may be Membership Interests  
as Securities

Capital Contributions \_\_\_\_\_  
Obligation(s) in addition to contributions \_\_\_\_\_  
Provisions relating to capital accounts and their maintenance \_\_\_\_\_

Percent of Ownership \_\_\_\_\_

4.3 Name and Address \_\_\_\_\_  
\_\_\_\_\_

Become a member of LLC? \_\_\_ Yes \_\_\_ No  
Active in exercising control in LLC? \_\_\_ Yes \_\_\_ No, may be Membership Interests  
as Securities

Capital Contributions \_\_\_\_\_  
Obligation(s) in addition to contributions \_\_\_\_\_  
Provisions relating to capital accounts and their maintenance \_\_\_\_\_

Percent of Ownership \_\_\_\_\_

4.4 Name and Address \_\_\_\_\_  
\_\_\_\_\_

Become a member of LLC? \_\_\_ Yes \_\_\_ No

Active in exercising control in LLC? \_\_\_ Yes \_\_\_ No, may be Membership Interests  
as Securities

Capital Contributions \_\_\_\_\_

Obligation(s) in addition to contributions \_\_\_\_\_

Provisions relating to capital accounts and their maintenance \_\_\_\_\_  
\_\_\_\_\_

Percent of Ownership \_\_\_\_\_

5. REGISTERED AGENT

5.1 Name of Registered Agent \_\_\_\_\_

5.2 Address of Registered Agent \_\_\_\_\_

6. ORGANIZATION

6.1 Date of Formation of LLC

\_\_\_\_\_ when filed with Secretary of State

\_\_\_\_\_ delayed until specified date \_\_\_\_\_

6.2 Management \_\_\_ Member-Managed \_\_\_ Manager-Managed

6.3 If manager-managed, are there types of amendments to the articles of  
organization that managers may adopt without member action? ORS 63.441 and  
444 \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

6.4 Latest Date of Dissolution

\_\_\_ LLC will dissolve on \_\_\_\_\_ (date)

\_\_\_ LLC is perpetual

6.5 Professional Services ORS 58.015

\_\_\_ LLC will render professional services

\_\_\_ LLC will not render professional services

7. MEMBERSHIP

7.1 Admission of New Members? \_\_\_ Yes \_\_\_ No

7.2 Withdrawal of Members? \_\_\_ Yes \_\_\_ No

7.3 Expulsion of Members? \_\_\_ Yes \_\_\_ No

8. GOALS

8.1 What are your expectations in forming an LLC? \_\_\_\_\_

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8.2 What are your non-tax reasons for having an LLC? \_\_\_\_\_

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8.3 Have you discussed whether an LLC will assist in meeting these goals with your accountant and/or business advisor? \_\_\_ Yes \_\_\_ No

OTHER INFORMATION YOU THINK MAY ASSIST ME IN FORMING YOUR LLC: \_\_\_\_\_

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