



**integrate cal community partners**  
a california benefit corporation

CLIENT INTAKE FORM – DOCUMENT CHECKLIST	NOTES
<input type="checkbox"/> State – Secretary of State (SoS) <u>Registration Form</u> (Articles of Incorporation)	CIF-DC-P1
<input type="checkbox"/> State – Secretary of State (SoS) <u>Registration Form</u> (Articles / Certificate of Organization / Formation)	
<input type="checkbox"/> State – Secretary of State (SoS) <u>Statement of Information</u> (Initial Filing)	
<input type="checkbox"/> State – Secretary of State (SoS) <u>Statement of Information</u> (Second Filing)	
<input type="checkbox"/> State – Secretary of State (SoS) <u>Change Form</u> (Articles / Certificate of Amendment)	
<input type="checkbox"/> State – Secretary of State (SoS) <u>Conversion, Merger, or Dissolution Forms</u>	
<input type="checkbox"/> State – Board of Equalization (BoE) <u>Seller's Permit</u>	
<input type="checkbox"/> State – Miscellaneous <u>Other Applicable Forms</u>	

<input type="checkbox"/> Federal – Department of the Treasury - Internal Revenue Service (IRS) <u>Employer Identification Number Assignment Letter</u> <hr/> <input type="checkbox"/> Federal – Department of the Treasury - Internal Revenue Service (IRS) <u>Corporate Election Forms</u> (1024, 2553, 8832, 8869, 8893, etc.) <hr/> <input type="checkbox"/> Federal – Department of the Treasury - Internal Revenue Service (IRS) <u>Tax Return Forms</u> (940, 941, 943, 1120, 1120S, etc.) <hr/> <input type="checkbox"/> Federal – Miscellaneous <u>Other Applicable Forms</u> <hr/>	CIF-DC-P2
<input type="checkbox"/> City and County – Various Departments <u>Business License Forms</u> <hr/> <input type="checkbox"/> City and County – Various Departments <u>Business Permit Forms</u> <hr/> <input type="checkbox"/> City and County – Clerk-Recorder <small>(name may vary)</small> <u>Fictitious Business Name (FBN) / Doing Business As (DBA) Request / Reservation Form</u> <hr/> <input type="checkbox"/> City and County – Miscellaneous <u>Other Applicable Forms</u> <hr/>	CIF-DC-P3
<input type="checkbox"/> Other Information <u>Federal, State, County, and/or City:</u> <hr/>	CIF-DC-P4
<input type="checkbox"/> Internal <u>Founders Agreements</u> (Partnership, Confidentiality, IP Assignment, etc.) <hr/> <input type="checkbox"/> Internal <u>Membership and Other Agreements</u> <hr/> <input type="checkbox"/> Internal <u>Business / Operations Plan</u> <hr/>	CIF-DC-P5