

LLC Formation Prep Worksheet

Fillable Planning Worksheet — ClearLegalTips.com (2026)

INSTRUCTIONS FOR USE

Complete this worksheet before you start your online LLC filing. Having every answer ready means you can finish the state application in one sitting — most online filings take under 15 minutes once your information is prepared. Bracketed prompts show what to enter.

1. Business Name

Most states require your name to include “LLC” or “Limited Liability Company” and to be distinguishable from existing businesses. Brainstorm three options in case your first choice is taken.

Name option 1: [e.g., Cedar Lane Studio LLC]

Name option 2: _____

Name option 3: _____

☐ Checked name availability on my Secretary of State's business database

☐ Confirmed a matching domain name is available (optional)

2. Principal Business Address

Street address: _____

Suite / unit: _____

City: _____

State: _____

ZIP: _____

3. Registered Agent

Every LLC needs a registered agent with a physical in-state address available during business hours.

☐ I will be my own registered agent

☐ I will hire a registered agent service

Registered agent name: _____

Registered agent physical address (no P.O. boxes): _____

4. Ownership (Members)

Member full name	Ownership %	Capital contribution	Role
	%	\$	

Member full name	Ownership %	Capital contribution	Role
	%	\$	
	%	\$	

■ Ownership percentages should total 100%.

5. Management Structure

- ☐ Member-managed (owners run day-to-day operations)
- ☐ Manager-managed (a manager runs operations)

6. Tax & EIN

- ☐ Plan to get a free EIN from the IRS after formation
- ☐ Default tax treatment (sole-prop / partnership)
- ☐ Will elect S-corp taxation (file Form 2553)

7. State Filing Details

Filing state: _____

Articles filing fee: _____

Annual report fee: _____

Annual report due date: _____

Expedite fee (optional): _____

8. Post-Formation Notes

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