

R. Thomas Irwin  
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9175 S. Yale Avenue  
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**CLIENT BUSINESS ENTITY DATA SHEET**

DATE \_\_\_\_\_ REFERRED BY \_\_\_\_\_

NAME \_\_\_\_\_ SS# \_\_\_\_\_

HOME ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_ COUNTY \_\_\_\_\_

HOME PHONE (\_\_\_\_) \_\_\_\_\_ CELL PHONE (\_\_\_\_) \_\_\_\_\_

EMAIL #1 \_\_\_\_\_ EMAIL #2 \_\_\_\_\_

SOCIAL SECURITY #: PRIMARY OWNER \_\_\_\_\_

BUSINESS NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_ CITY \_\_\_\_\_

STATE \_\_\_\_\_ ZIP \_\_\_\_\_ COUNTY \_\_\_\_\_

BUSINESS PHONE (\_\_\_\_) \_\_\_\_\_ BUSINESS EMAIL \_\_\_\_\_

BUS. PARTNER \_\_\_\_\_ PHONE \_\_\_\_\_

BUS. PARTNER \_\_\_\_\_ PHONE \_\_\_\_\_

BUS. PARTNER \_\_\_\_\_ PHONE \_\_\_\_\_

BUS. PARTNER \_\_\_\_\_ PHONE \_\_\_\_\_

UNITED STATES CITIZEN: YOU:  YES  NO; SPOUSE:  YES  NO

SERVICES DESIRED:  ORGANIZATION  BUSINESS PLANNING

OTHER \_\_\_\_\_

CB \_\_\_\_\_ ATY \_\_\_\_\_

I. ENTITY NAME: \_\_\_\_\_

II. TRADE NAME, IF DIFFERENT: \_\_\_\_\_

III. IF A CORPORATION; NUMBER OF SHARES TO BE AUTHORIZED:

CLASS A

CLASS B (if desired)

\_\_\_\_\_

\_\_\_\_\_

IV. SPECIAL CLASS FEATURES, IF ANY:

\_\_\_\_\_

\_\_\_\_\_

V. INITIAL SUBSCRIBERS TO STOCK/MEMBERSHIP INTERESTS:

<u>NAME</u>	<u>ADDRESS</u>	<u># of SHARES &amp; CLASS</u>	<u>S.S. #</u>
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1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

**VI. REGISTERED AGENT AND OFFICE:**

(Must be a director or member/manager or an attorney of the Oklahoma Bar Association - office address must be same as registered office and must include street address and city or county.)

NAME

ADDRESS

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**VII. ADDRESS AND PHONE NUMBER OF PRINCIPAL PLACE OF BUSINESS:**

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PHONE ( )

**VIII. INITIAL BOARD OF DIRECTORS: NUMBER \_\_\_\_\_**

NAME

ADDRESS

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

5. \_\_\_\_\_

6. \_\_\_\_\_

7. \_\_\_\_\_

**IX. INITIAL OFFICERS:** AUTHORIZED TO SIGN CHECKS & NOTES

PRESIDENT \_\_\_\_\_ [ ] YES [ ] NO

VICE PRESIDENT \_\_\_\_\_ [ ] YES [ ] NO

SECRETARY \_\_\_\_\_ [ ] YES [ ] NO

TREASURER \_\_\_\_\_ [ ] YES [ ] NO

OTHER \_\_\_\_\_ [ ] YES [ ] NO

**X. FISCAL YEAR:** \_\_\_\_\_

**XI. ANNUAL MEETING:** \_\_\_\_\_

**XII. FEDERAL ID#:** \_\_\_\_\_

IF NONE, THEN:

A. DATE BUSINESS STARTED \_\_\_\_\_

B. CLOSING MONTH OF ACCOUNTING YEAR \_\_\_\_\_

C. FIRST DATE WAGES PAID \_\_\_\_\_

D. HIGHEST NUMBER OF EMPLOYEES EXPECTED IN NEXT TWELVE MONTHS

NONAGRICULTURAL \_\_\_\_\_

AGRICULTURAL \_\_\_\_\_

HOUSEHOLD \_\_\_\_\_

E. PRINCIPAL ACTIVITY \_\_\_\_\_

F. IF PRINCIPAL ACTIVITY IS MANUFACTURING, WHAT IS PRINCIPAL PRODUCT AND RAW MATERIAL?

\_\_\_\_\_



- (5) DATE OF INCORPORATION \_\_\_\_\_
- (6) STATE OF INCORPORATION \_\_\_\_\_
- (7) NEW ADDRESS/NAME SINCE RECEIVING EIN IN (A) ABOVE? \_\_\_\_\_
- F. ELECTION EFFECTIVE (MO/DAY/YR) \_\_\_\_\_

**XV: STOCKHOLDER'S AGREEMENT:**

- A. OPTIONAL PURCHASE BY CORPORATION OR STOCKHOLDERS [ ]
- B. MANDATORY PURCHASE BY CORPORATION
- FUNDED BY LIFE INSURANCE [ ]
- NOT FUNDED WITH LIFE INSURANCE [ ]
- C. OPTIONAL PROVISION-RESOLUTION OF DEADLOCKS [ ]
- D. PURCHASE PRICE FOR STOCK: [ ] BOOK VALUE
- [ ] FIXED AMT. \$ \_\_\_\_\_
- [ ] VARIABLE \$ \_\_\_\_\_
- E. TERMS FOR PAYMENT: \_\_\_\_\_ YEARS
- \_\_\_\_\_ DOWN PMT.
- \_\_\_\_\_ INTEREST RATE YES

**XVI. PENSION OR PROFIT-SHARING PLAN** [ ]

**XVII. MEDICAL REIMBURSEMENT PLAN** [ ]

**XVIII. GROUP MEDICAL CARE PLAN** [ ]

**XIX. GROUP LIFE INSURANCE PLAN** [ ]

**XX. OPTIONAL PROVISIONS IN ARTICLES OR BY-LAWS:**

A. WAIVER OF PREEMPTIVE RIGHTS [ ]

- B. QUORUM FOR STOCKHOLDERS/MEMBERS  
 MAJORITY [ ] TWO-THIRDS [ ] OTHER \_\_\_\_\_
- C. QUORUM FOR DIRECTORS/MEMBERS  
 MAJORITY [ ] TWO-THIRDS [ ] OTHER \_\_\_\_\_
- D. AUTHORITY TO BORROW FROM DIRECTORS/MEMBERS [ ]
- E. LIMITATIONS ON AUTHORITY OF BOARD OF DIRECTORS TO ACT  
 \_\_\_\_\_
- F. RATIFICATION OF ACTS OF PROMOTERS [ ]

**XXI. PROFESSIONAL CORPORATIONS-EMPLOYMENT CONTRACT:**

- A. EMPLOYEE'S NAME \_\_\_\_\_
- B. EMPLOYEE'S PROFESSION \_\_\_\_\_
- C. OFFICE HELD \_\_\_\_\_
- D. DATE EMPLOYMENT BEGAN \_\_\_\_\_
- E. COMPENSATION \$ \_\_\_\_\_ mo/yr
- F. TERMINATION NOTICE PERIOD \_\_\_\_\_
- G. EXPENSES TO BE PAID BY CORP \_\_\_\_\_
- H. DURATION OF RESTRICTIVE COVENANT \_\_\_\_\_
- I. ENTERTAINMENT ALLOWANCE \_\_\_\_\_
- J. ANNUAL VACATION \_\_\_\_\_ days/weeks
- K. MILEAGE REIMBURSEMENT RATE \_\_\_\_\_

**XXII. COMMENTS:** \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

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***R. THOMAS IRWIN***, Attorney at Law

Thom is the founder of **Irwin & Sherman, P.C.**, located in Tulsa, Oklahoma. For over 30 years, Thom has specialized in the areas of Estate Planning, Charitable Gift Planning, Business Planning and Tax.

Thom is a graduate of Oral Roberts University Law School, class of 1982.

Upon graduation from Oral Roberts University Law School in 1982, Thom worked in the Estate and Planned Giving Department of the Christian Broadcasting Network in Virginia Beach, Virginia, assisting people in the planning of their estates. He taught at the **Regent University School of Law**, formerly full-time and as an adjunct professor, taught Estate Planning for the Professional Financial Planning program at **Old Dominion University** in Norfolk, Virginia, and more recently taught Estate Planning as an adjunct professor at **Northeastern State University**, Broken Arrow, Oklahoma.

Thom conducts seminars for churches, charitable organizations, business owners, professionals and others in the areas of Estate Planning, Gift Planning, and Business Planning.

***DANIEL L. SHERMAN***, Attorney at Law

Dan is both an attorney and a licensed professional counselor. After graduating from Wheaton College, he returned to Tulsa and attended the University of Tulsa College of Law. While in law school he worked on the Tulsa Law Review as a production editor and graduated with honors in 2000.

In addition to his law license, Dan is also a licensed professional counselor after graduating with honors from Oklahoma State University in 2005 with a Master of Science in Counseling. His legal experience combined with his counseling experience help him to connect with the emotional needs of his clients while also giving them sound legal representation.

Dan is also an adjunct professor at **Southwestern Christian University** at its campus in Broken Arrow where he has taught since 2012.