



Pottstown

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Pottstown SCORE, Chapter 594  
244 High Street, Suite 102  
Pottstown, PA 19464

## Business Team Questionnaire

Name of Firm: \_\_\_\_\_

Address: Line 1: \_\_\_\_\_

Line 2: \_\_\_\_\_

Post Office \_\_\_\_\_ Zip Code: \_\_\_\_\_

Website: \_\_\_\_\_

### Primary Contact:

Name: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Email Address: \_\_\_\_\_

Type of Firm:  Attorney,  Accountant,  Insurance Agency,  Banking,  Other

### Services Offered:

Attorney:  Business Formation:  Sole Proprietor,  Partnership,  Corporation  
 Owner Agreements:  Partnership,  Shareholder,  LLC Member  
 Contract:  Preparation,  Review,  Prosecution  
 Liability:  Defense,  Prosecution  
 Purchase/Sale of Business  
 Succession Planning  
 Labor Law,  Workman's Compensation Suits  
Other (describe) \_\_\_\_\_

Accountant:  Business Registration:  Sole Proprietor,  Partnership,  Corporation,  LLC,  Out-of-State  
 Tax Return Preparation & Filing:  Sole Proprietor,  Partnership,  Corporation,  Sales/Use Tax Filings  
 Payroll:  Records,  Checks,  Withholding Filings & Deposits  
 Bookkeeping,  Annual Report,  Audits  
 Business Valuation,  Retirement Planning  
Other (describe) \_\_\_\_\_

Insurance:  General Business Insurance,  Commercial Auto,  Business Property  
 Workman's Compensation  
 Key Employee,  Business Continuation  
 Professional Liability,  Directors & Officers Liability  
 Group Health  
Other (describe) \_\_\_\_\_

