

**DAVIS SCHILKEN, PC**  
— LAW OFFICES —

523 PARK POINT DRIVE, SUITE 350  
GOLDEN, COLORADO 80401  
PHONE: 303.670.9855 • FAX: 303.670.5381

925 W. KENYON AVENUE, UNIT 1  
ENGLEWOOD, COLORADO 80110  
PHONE: 303.762.1954 • FAX: 303.762.0014



**The Strategic  
Legal Assessment™**

*Your CorporateShield Advantage™*

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

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

Date: \_\_\_\_\_

**[www.dslawcolorado.com](http://www.dslawcolorado.com)**

WELCOME TO

# YOUR CORPORATE SHIELD ADVANTAGE™

*Because Your CorporateShield Advantage™ is committed to helping you grow your business, it is important we know about you and your company. Completing this workbook also gives you the opportunity to begin the goal setting process for your business. When you finish the exercises in this workbook, you will have better clarity in your path to success.*

## **Please Tell Us More About The Following**

Please complete the requested information about your company.

## **What We Recommend You Bring To The Strategic Legal Assessment™**

This is a list of important items to bring to The Strategic Legal Assessment™. During this meeting we will conduct *The Annual Corporate Protection Maximizer™* to determine any areas of danger for you. The listed items are an essential part of this process.

## **Additional Questions**

Please answer the additional questions about what concerns you have and why you are meeting with our law firm. We have found that having a clear understanding of what you need assistance with and what you expect from our firm allows us to better serve you.

## **Your Trusted Advisors**

Please share with us who your current advisors are so we can work as a team to assist you.

## **Your 3 Best Improvements in Your Company**

In this exercise, we are asking you to look back over the past two years and list the 3 best improvements you have made in your business. These can be changes that have had an impact internally on your team or externally on the marketplace. For each improvement, record the reason why it was important, the further progress you can make in this area, and the first action that will move you forward. It is important we know the direction you are leading your company and where you have been successful in the past.

## **What You Bring With You to Your Meeting:**

To get the most value from your meeting, please bring the following items with you:

- Your Completed Strategic Legal Assessment™ Workbook
- Copies of documents recommended in this workbook
- Corporate checkbook or corporate credit card

**Please Tell Us About the Following:**

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

Name of Your Company: \_\_\_\_\_

Fictitious Name (D/B/A): \_\_\_\_\_

Your Company Address: \_\_\_\_\_  
\_\_\_\_\_

Phone Number: (\_\_\_\_) \_\_\_\_\_

Fax Number: (\_\_\_\_) \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

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

Employer Identification Number: \_\_\_\_\_

What type of product and/or service does your company provide?

\_\_\_\_\_

Name of Registered Agent: \_\_\_\_\_

Address of Registered Agent: \_\_\_\_\_

\_\_\_\_\_

Gross Revenues Last Year: \$ \_\_\_\_\_

Anticipated Revenues this Year: \$ \_\_\_\_\_

List of Key Employees (Attach separate list if necessary)

	Employee Name	Title
1.	_____	_____
2.	_____	_____
3.	_____	_____
4.	_____	_____
5.	_____	_____

# WHAT WE RECOMMEND YOU BRING TO THE STRATEGIC LEGAL ASSESSMENT™

- ❑ **Any documents supporting your legal concerns**
- ❑ **Corporate Minute Book, if you have one**
- ❑ **Stock Certificates and/or Unit Certificates,  
if issued**
- ❑ **Buy/Sell, Shareholder, or Operating  
Agreements, if any**
- ❑ **Employment Agreements, if any**
- ❑ **Business Plan, if you have one**
- ❑ **Anything else you believe relevant**

# The Strategic Legal Assessment™

Please briefly tell us about your legal needs.

Why are you looking to work with a law firm?

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What are the concerns or issues that you would like to discuss. Please list.

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Have you ever been sued before? If yes, please briefly state what happened.

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# Who Are Your Current Trusted Advisors?

## Your CPA

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

Firm: \_\_\_\_\_

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

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

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

What do you like, respect, or admire about this person?

\_\_\_\_\_  
\_\_\_\_\_

Do we have your permission to talk to your CPA?

Do we have your permission to contact your CPA?

YES     NO     It depends, ask me first

## Your Financial Advisor

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

Firm: \_\_\_\_\_

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

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

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

What do you like, respect, or admire about this person?

\_\_\_\_\_  
\_\_\_\_\_

Do we have your permission to contact your Advisor?

YES     NO     It depends, ask me first

**Please share with us more about your business.**

What do you believe is the core competency of your business?

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What are your 3 greatest frustrations about your business currently?

Frustration	Why

# YOUR CORPORATE SHIELD

## ADVANTAGE™

### 3 Best Improvements in My Company over the Past 2 Years

Improvement	Impact	What else can I do?	Next step?
<i>Example: Hired a new Office Manager</i>	<i>Freed up 20 hours a week of my time so now I can focus on my company's goals</i>	<i>Delegate payroll to new Office Manager</i>	<i>Set up training schedule to expedite training new office manager on payroll system</i>

*(To be completed at The Strategic  
Legal Assessment™)*

**NEXT ACTIONS**

Next Action	By Whom	By When
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>
		<input type="checkbox"/>

We are committed to growing our business, do you know of any business owners that you would recommend we invite to a Strategic Legal Assessment™?

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
Phone: \_\_\_\_\_  
Email: \_\_\_\_\_

Name: \_\_\_\_\_  
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## About Our Law Firm

The team at Davis Schilken, P.C. helps clients by providing experience, leadership, and innovative solutions through a practical, systematic, process-driven approach. We work as a team with other planning professionals to maximize resources and valuable experience, to satisfy every client's deepest needs.

Our Mission – To plan for everyone you love and everything you own. We provide planning solutions for individuals, families, and business owners.

We enjoy working with our client's advisors. We have an array of continuing education course on estate and business planning and have taught over 2,000 Colorado CPA's, Certified Financial Planners, and insurance professionals.

*For more information on our team, visit [WWW.DSLAWCOLORADO.COM](http://WWW.DSLAWCOLORADO.COM).*