

1

### Identify All Jurisdictions

Determine where the entity is formed and qualified to do business. Set timers in our system for all Secretary of State filing deadlines.

2

### Review Status of All Filing Requirements

Review status of Secretary of State filings in all jurisdictions and ensure entity is current in each state with its filings. If a filing is due, charge the filing fee and our entity management fee, handle the filing, and send receipt to client.

4

### Determine Good Standing

Determine whether the entity is active in all states where it is doing business. If not, review and communicate with client.

3

### Review Resident Agents

Review all agents for service of process in each jurisdiction. Substitute in as resident agent if a commercial resident agent is in place (waive fees, charge filing fees only). If an individual is listed as the resident agent, confirm with the client that the person listed is properly associated with the entity.

5

Does the entity have Bylaws?

### If there are no Bylaws:

Prepare Amended and Restated Bylaws to set meeting date and send to client (no charge).

### If there are existing Bylaws:

Set the meeting date to be consistent with the Bylaws. If the Bylaws do not have a meeting date, send Amended and Restated Bylaws (no charge).

7

### Corporate Minutes

Prepare corporate minutes for current year if not in file and charge our entity management fee.

6

### Review Corporate Documents

Organize online document library and provide all appropriate members of clients' team with access.

8

### Organizational Changes

If client has communicated changes to officers or directors, prepare appropriate resolutions to authorize changes and amendments to Secretary of State filings.

9

### Clean Up

Review all corporate documents provided by client and provide client with recommendations to clean up missing or incomplete items.

