



The Strategic Legal Audit™

Your CorporateCounsel Advantage™

Name: _____

Company Name: _____

Date: _____

**The Strategic Counsel, L.C.
Attorneys & Counselors at Law**

4805 W. Laurel Street, Suite 230
Tampa, Florida 33607
(813) 286-1700

4802 26th Street W, Suite A
Bradenton, Florida 34207
(941) 755-9400

www.thestrategiccounsel.net

WELCOME TO

YOUR CORPORATE COUNSEL

ADVANTAGE™

Because Your Corporate Counsel 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 Audit™

This is a list of important items to bring to The Strategic Legal Audit™. 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 Audit™ 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 AUDIT™

- ❑ **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 Audit™

Please briefly tell us about your legal needs.

Why are you looking to work with a law firm?

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

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

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 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?

What are your 3 greatest frustrations about your business currently?

Frustration	Why

YOUR CORPORATE COUNSEL

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 Audit™)

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 Audit™?

Name: _____
Address: _____
Phone: _____
Email: _____

Name: _____
Address: _____
Phone: _____
Email: _____

Name: _____
Address: _____
Phone: _____
Email: _____

Name: _____
Address: _____
Phone: _____
Email: _____

About Our Law Firm Team

Our team is committed to creating a better future. We achieve this through our unique planning processes, empowering our clients to make a difference for their family, business, and community. Our firm is unique in that our team members are not just employees, but contribute to the growth and success of our business. Most law firms require clients to depend solely on the attorney. We have developed a business model to better serve our clients by training our team members to facilitate our client's needs. This business model has proven to be so successful, our team members now train other law firms in transforming their practices.

We bring diverse experiences to create a collective resource for our clients. Our core value of integrity ensures we uphold the highest standard of service.

Our team members create and lead national programs training legal assistants on communication, productivity, and focus management skills. We possess various backgrounds allowing us to bring effective problem-solving skills to assist our clients. We pride ourselves on taking ownership and accountability to help every client achieve their goals. Our expertise in national event planning allows us to provide an unsurpassed experience for our clients.

Our team has created several unique processes, such as The Family Protector Program™, The Protected Advisor Advantage™, The Protected Physician Advantage™, The Exit Strategy™, The Blended Family Solution™, and Your Corporate Counsel Advantage™.

Our founder, **Attorney Steve Riley**, is a nationally recognized speaker. He is a graduate of Berry College and the University of Florida School of Law. Steve is a contributing author to five books on estate planning, retirement planning, wealth protection and business planning.

Attorney Tom Whitaker is the Managing Partner of our Bradenton office. He is a graduate of the University of the South and Stetson University College of Law, and has post-graduate training in estate planning and Medicaid asset protection. Tom, who has practiced in Bradenton and Sarasota since 1988, is licensed in both Florida and North Carolina.

Attorney Jim Rowe is the Managing Partner of our Palm Harbor office. He is a graduate of Michigan State University and the Michigan State University College of Law and is licensed to practice in Florida and the District of Columbia. Jim has served as secretary and general counsel to financial services corporations and is a former life insurance company president.

For more information on our team, visit www.thestrategiccounsel.net.