

Business & Non-Profit

Whether you are establishing a new entity (for estate planning purposes or as an actual business) and need help with legal documents and state filings, or you have an existing entity and need help with some logistics, we have a lot of experience with corporate entities. We can help guide you with the following areas of need:

- Serving as Clerk or Registered Agent
- Filing Annual Reports with the State of Maine
- Preparing Bylaws or Agreements
- Maintaining meeting minutes
- Keeping record of stock transfers or membership interests
- Collaboration with professional tax preparers and accountants
- Policy and Procedure creation
- Succession planning for the small business owner

The not-for-profit sector sometimes needs guidance that may differ from what for-profit businesses need to consider. We can assist with the following:

- Board education, including a review of fiduciary duty
- Help with audit preparation
- Advice on charitable contributions and planned giving
- Assistance with best practices and appropriate procedures
- Creation of an Investment Policy

Please continue on to our [Articles](#) page for in-depth information on specific concepts.