

Incorporation - Step by Step Process

Effective date will be on the 1st day of the month 60 days from the time the ASR receives the Articles of Incorporation, Corporate License and new Tax ID number.

Note: Current legal obligations (child support, alimony payments, tax liens, etc.) may hinder your ability to incorporate.

TO BEGIN THE INCORPORATION PROCESS YOU WILL NEED THE FOLLOWING:

- Copy of Certified Articles of Incorporation.
 - Corporation must be filed as a Subchapter S or C, a LLC is NOT acceptable.
 - Must be approved, filed and date stamped by the Secretary of State.
 - Articles of Incorporation must be filed as using one of the following examples given. Deviations are not allowed and will cause your request to be delayed.
 - John Doe Insurance Agency, Inc
 - Doe Insurance Agency, Inc
 - John Doe Ins and Financial Services, Inc
 - Doe Ins and Financial Services, Inc

Note: Due to system limitations, only 30 alpha characters can be used in State Farm's system, thus we will have to abbreviate the words Insurance (INS), Agency (AGCY), Incorporated (INC), Financial (FIN), and Services (SVCS). No punctuation or other characters such as the "&" will be allowed. For example:

- John Doe Ins Agcy, Inc
- John Doe Ins and Fin Svcs, Inc

The Incorporated abbreviated name will appear on your marketing materials and Dec pages.

- Agent (President) must own at least 51% and provide the names & stockholder interest of each stockholder.
- Please check with your department of Banking to determine if a new Mortgage Brokers License is needed beneath the corporate name.
- Copy of: Corporation Insurance License (not applicable in Wisconsin)
- New Tax ID Number

ONCE THE ABOVE DOCUMENTATION IS COMPLETE PLEASE PROCEED

Step 1

- Complete Request to Incorporate form.

Note: Current legal obligations (tax liens, judgments, etc.) may hinder your ability to Incorporate.

Step 2

- Agent must fax Articles of Incorporation and Corporate License within 48 hours to ASR ATTN: to Requesting Agent's State at 214-296-8007.