TAXABLE YEAR

2008

Small Business Stock Questionnaire

CALIFORNIA FORM

3565

Attach to Form 100 or Form 100W.

Corporation name	California corporation number
Address (including suite, room, or PMB no.)	FEIN
City / State / ZIP Code	

A. Taxable year (beginning and ending)	**B.** Date of incorporation	**C.** State of incorporation
D. Date of qualification in California	**E.** Principal business activity	**F.** Principal business activity code (Do not leave blank)

If the answer to any of the questions G through L is "No," STOP; do not complete this form because the stock issuance does not qualify under California Revenue and Taxation Code Section 18152.5.

G. Did the corporation issue non-treasury stock during the current taxable year? . . . . . Yes ☐ No ☐
Date of stock issuance for which this information applies: ____ / ____ / ____ (Month Day Year)

H. Was the non-treasury stock issued, in whole or in part, for money, for property other than stock, or for services provided to the corporation? . . . . . Yes ☐ No ☐

I. Were the corporation's aggregate gross assets less than or equal to $50,000,000 from the period beginning July 1, 1993, to the date of issuance of the non-treasury stock? See instructions . . . . . Yes ☐ No ☐

J. Was at least 80% of the corporation's payroll in California at the date of issuance of the non-treasury stock? . . . . . Yes ☐ No ☐

K. Was the corporation a domestic corporation at the date of issuance of the non-treasury stock? . . . . . Yes ☐ No ☐

L. Since the issuance of non-treasury stock, was this a corporation with a classification **other than a:**
- RIC, REIT, or REMIC? . . . . . Yes ☐ No ☐
- DISC or former DISC? . . . . . Yes ☐ No ☐
- Corporation with an IRC Section 936 election in effect or a direct or indirect subsidiary with an election? . . . . . Yes ☐ No ☐
- Cooperative? . . . . . Yes ☐ No ☐

M. Did the corporation's assets (in excess of liabilities) consist of 10% or less of stocks or securities of a non-subsidiary corporation(s)? . . . . . Yes ☐ No ☐

N. Since the issuance of non-treasury stock, was this corporation a C corporation for California purposes? . . . . . Yes ☐ No ☐

O. Since the issuance of non-treasury stock, were at least 80% (by value) of the corporation's assets used in the active conduct of one or more qualified trades or businesses in California? See instructions. . . . . Yes ☐ No ☐

P. What percentage of the total value of assets consisted of real property not used in the active conduct of the trade or business? See instructions . . . . . _____%

Q. What was the aggregate subscription amount for all non-treasury stock issuances during the corporation's existence prior to the current issuance? . . . . . $ _____

R. What was the aggregate subscription amount of non-treasury stock issued during the current taxable year? . . . . . $ _____

S. How much of the amount in Question R did the corporation **receive for** qualified small business stock? . . . . . $ _____

T. What was the date of the first non-treasury stock issuance during the current taxable year? . . . . . ____ / ____ / ____ (Month Day Year)

U. What was the date of the last non-treasury stock issuance during the current taxable year? . . . . . ____ / ____ / ____ (Month Day Year)

V. What was the aggregate percentage of the total purchases of this corporation's own stock (relative to the aggregate value of the corporation's total stock for a two-year period beginning on the date one year before the issuance of this stock)? (If the aggregate percentage is more than 5%, the stock does not qualify as small business stock.) . . . . . _____%

Under penalties of perjury, I declare that I have examined this form, and to the best of my knowledge and belief, it is true, correct, and complete.

Signature of officer ▶

Print name and title | Date

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