

PROSPECTIVE PATENT CLIENT INTAKE CHECKLIST

Prospective Client Data:

Name of Prospective Client _____
Address _____
Telephone _____ Number(s)

Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____
Website _____
Large Entity / Small Entity? State of Incorporation _____

Inventor(s) Data:

Inventor _____
Address _____
Citizenship _____
Telephone _____ Number(s)

Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____

Inventor _____
Address _____
Citizenship _____
Telephone _____ Number(s)

Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____

Inventor _____
Address _____
Citizenship _____
Telephone _____ Number(s)

Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____

Inventor _____
Address _____
Citizenship _____
Telephone _____ Number(s)

Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____

Firm Representation:

Intake Attorney _____
Firm Docket No. _____ Client Ref. No. _____ Foreign Agent Ref. No. _____
Initial Consultation Fee _____
Engagement Letter _____
Fee Agreement _____
Retainer Fee _____
Estimated Preparation and Prosecution Costs and Fees _____

Threshold Issues:

Statutory Bar Date, e.g., Publication or other Public Disclosure? _____
On-Sale Bar Date, e.g., Offer or Advertisements for Sale, _____
Known Prior Art _____
Common Ownership (but different set of inventors) with Known Prior Art _____
Foreign Filing? Y/ N If Y, Designation of States _____
US Provisional Application or Nonprovisional Application _____
Design Patent Application or Utility Patent Application _____
Nondisclosure Agreement(s) _____
Potential Infringer(s) _____
Assignment of Invention? Y/ N If so, intended Assignee _____
Licensing of Invention? Y/ N If so, intended Licensee _____
General Agreement to Assign, e.g., via Employment Agreement _____
Conflict of Interest with Respect to Parties _____
Conflict of Interest with Respect to Technologies _____
Conflict of Interest Form Completion _____

Invention Disclosure:

Title of the Invention _____
Cross-reference to Related Application(s) _____
 Priority Document _____
 Priority Date _____
Government Sponsored R & D _____
Sequence Listing _____
Technical Field _____

Background Art _____

