

PROSPECTIVE TRADEMARK CLIENT INTAKE CHECKLIST

Prospective Applicant/Client Data:

Name of Prospective Applicant Client _____
Address _____
Telephone _____ Number(s) _____
Fax Number(s) _____
Cellular Phone Number(s) _____
E-mail address _____
Website _____
Contact Representative _____
State of Incorporation _____

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:

First Use Date _____
First Use in Interstate Commerce Date _____
Known Prior Registration(s) _____
Common Ownership with Known Prior Registration(s) _____
Previous US or Foreign Filing for Priority Claim _____
Foreign Filing Desired? Y / N If Y, Designation of States/Regions _____
Potential Infringer(s) _____
Assignment of Mark? Y / N If Y, Name of intended Assignee _____
Licensing of Mark? Y / N If Y, Name of intended Licensee _____
Conflict of Interest with Respect to Parties _____
Conflict of Interest with Respect to Channels of Trade _____
Conflict of Interest Form Completion _____

Details of the Mark:

Mark _____
Trademark _____ Service Mark _____
Word Mark _____ Design Mark _____
Combined Mark _____ Stylized Mark _____
International Class(es) _____

Description of the Mark _____

Identification of Goods or Services _____

Drawing of the Mark:

Specimen of the Mark: