

# PROSPECTIVE COPYRIGHT 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 Publication Date \_\_\_\_\_  
Author \_\_\_\_\_  
Owner \_\_\_\_\_  
Work for Hire? Y / N \_\_\_\_\_  
Assignment of Copyright? Y / N If Y, Name of intended Assignee \_\_\_\_\_  
Licensing of Copyright? 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 \_\_\_\_\_

## Specimen:

**For Nondramatic Literary Works (TX) Applications: (INCLUDES: In product collateral, welcome letters, catalogs, pamphlets, print ads, labels, shipper boxes, instructions, packaging):**

Three (3) identical specimens of the work  
Year in which creation of the work was completed \_\_\_\_\_  
Month, day and year of publication in the U.S. \_\_\_\_\_  
Author name \_\_\_\_\_

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### **For Performing Arts (PA) Applications: (INCLUDES: Infomercials, DVDs, and other videos):**

- Two (2) identical specimens of the work  
 One (1) copy of the shooting script (if any) or a brief written description of the content

Year in which creation of the work was completed \_\_\_\_\_

Month, day and year of publication in the U.S. \_\_\_\_\_

Author name \_\_\_\_\_

### **For Visual Arts (VA) Applications: (INCLUDES: Drawings, illustrations, photographs, sculptures – NOTE this does not include trademarks):**

- Three (3) identical specimens of the work

Year in which creation of the work was completed \_\_\_\_\_

Month, day and year of publication in the U.S. \_\_\_\_\_

Author name \_\_\_\_\_