



Business / Commercial Intake

Entity formation, contracts, transactions, media & licensing, and business disputes

PRIMARY CONTACT

First Name	Last Name	Title / Role
Mobile Phone	Direct Phone	Email Address
Preferred Contact Method	How Did You Hear About Us	

BUSINESS / ENTITY INFORMATION

Legal Entity Name		DBA / Trade Name	
Entity type			
LLC	S-Corporation	C-Corporation	Partnership
Sole Proprietor	Nonprofit	Not Yet Formed	Other
State of Formation	Date Formed	EIN	
Principal Business Address		City / State / Zip	
Mailing Address (if different)		Website	
Industry / Nature of Business		Year Established	
No. of Owners / Members	No. of Employees	Annual Revenue Range	

OWNERSHIP & MANAGEMENT

Owners / members and ownership percentages

Officers / managers and their roles

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MATTER / SERVICES NEEDED

Type of legal service (check all that apply)

Entity formation	Operating agreement / bylaws	Contract drafting
Contract review	Buy / sell agreement	Merger / acquisition
Employment matters	Trademark / IP	Media / licensing
Litigation / dispute	Collections	Compliance / regulatory
General counsel	Other	

Describe the matter and what you need help with

Desired Outcome

Deadline / Urgency

OTHER PARTIES & DOCUMENTS

Other Party / Counterparty Name

Their Relationship to You

Opposing Counsel (if any)

Phone

Are there existing contracts or documents involved?

Yes No

Does the entity have an operating agreement / bylaws?

Yes No

Have you used another attorney for this matter?

Yes No

LITIGATION / DEADLINES

Is there any pending or threatened litigation?

Yes No

Court / Jurisdiction

Case Number

Upcoming Deadline or Hearing Date

Statute of Limitations Concern?

CONFLICTS & BILLING



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Related parties, affiliates, or adverse parties for our conflict check

Preferred billing arrangement

Hourly

Flat fee

Monthly retainer

Not sure

Billing Contact Name

Billing Email

Additional information you want us to know

ACKNOWLEDGMENT

Completing this form does not create an attorney-client relationship. It is used to evaluate a potential matter and is kept confidential.

Client / Representative Signature

Date

Staff Member Completing Intake

Date