



TRADEMARK INTAKE FORM

YOU'RE ONE STEP CLOSER TO PROTECTING WHAT'S UNIQUELY YOURS!

This Intake Form is designed to give us a clear picture of your vision, your brand, and your goals. To ensure a productive and personalized consultation, please complete and submit the form at least **72 hours** before your scheduled appointment. This allows us the time to carefully review your details and come prepared to support you with intention and focus. Don't stress about having every document or answer upfront. Share what you can now, and we'll guide you through the rest with care and clarity. Your brand deserves protection—let's turn your vision into lasting security!

DISCLAIMER: Your privacy matters. Everything you share here is kept strictly confidential and used only to prepare for your consultation. Just a heads-up: completing this form doesn't establish an attorney-client relationship. Our initial meeting is simply a starting point for us to explore your needs—no pressure, no obligations until we both agree to move forward. **A formal agreement must be signed in order to become an OFFICIAL FOREVER LEGAL CLIENT.**

Today's

Date: _____

How did you hear about FOREVER LEGAL? _____

PERSONAL INFORMATION

What is your full name? *[First Name, Middle, Last Name]* _____

What is your business title? _____

Will you be the owner of the Trademark?

☐ Yes ☐ No

What is your driver's license number? _____

What is your current address? *[Street Address or PO Box, City, State, Zip]*

What is your county of residence? _____

What is your email address? _____

What is your phone number? _____

What is your preferred method of contact? _____



What is the name of the business? _____

ADDITIONAL OWNER INFORMATION

Is there an additional owner?

☐ Yes

☐ No

If yes:

What is their full name? *[First Name, Middle, Last Name]* _____

What is their driver's license number? _____

What is their social security number? _____

What is their current address? *[Street Address or PO Box, City, State, Zip]*

What is their county of residence? _____

What is their email address? _____

What is their phone number? _____

What is their preferred method of contact? _____

What is their business title? _____

What percentage of the business do they own? _____

Are there any written contracts between the business partners? *[Please upload a copy.]*

☐ Yes

☐ No

If yes, describe: _____

BUSINESS INFORMATION

What is the business address? _____

What is the business phone number? _____

If the business is a corporation or LLC, which state is the company incorporated or organized in? _____



What is the primary purpose of the business? _____

TRADEMARK INFORMATION

What Trademark protection do you need? *[Select all that apply.]*

☐ Name

☐ Slogan

☐ Logo Design

☐ Other: _____

Provide a description of the mark *[For example: My business name is BEBE's Bonafide Burgers]:* _____

Description of goods and services: *[Please use the common commercial or generic names for the goods or services. Be as specific as possible. For example: brick and mortar fast food restaurant service selling burgers, fries, and non-alcoholic beverages.]*

Are you currently using the mark?

☐ Yes ☐ No

What specimen samples will you provide? *[A specimen is a sample that demonstrates how the mark is used in commerce, i.e., labels, tags, website, menus, brochures, etc.] For more information on specimens read **FOREVER LEGAL's** Trademark Specimen Information Sheet.*

Please identify where you would like to claim protection for this Trademark?

☐ State Protection

☐ Federal Protection

☐ Other: _____

ADDITIONAL INFORMATION



Is there additional information you would like FOREVER LEGAL to know in advance of our consultation?

Are there any specific questions you have that should be addressed in our consultation?

CERTIFICATION

I hereby affirm that the information contained in this questionnaire is complete and accurate to the best of my/our knowledge.

Signature

Date

DO NOT EMAIL THIS INTAKE FORM. TO ENSURE YOUR INFORMATION REMAINS SECURE UPLOAD YOUR FORM IN MYCASE. THANK YOU!