



2608 Stonewall Street | P.O. Box 1353 | Greenville, Texas 75403 | P: 903.454.0044 | F: 903.454.1514

POTENTIAL NEW CLIENT WORKSHEET

United States Trademark Procurement
Services starting at \$1500 (all fees included)

Dear Potential Client,

Please fill out this worksheet and submit it to our firm via email at Kimber@ScottRayLaw.com. If the requested information is unknown state "Unknown." If information does not apply "N/A." Should you have any questions regarding how to complete this form or submit it to our firm, please feel free to contact Kimber Patterson, at (903) 269-3615.

We aim to meet your goals with respect to securing a United States Trademark to protect the logo representing your goods or services. We can meet almost any goal ranging from quickly preserving "file-to-file" rights, to providing an in-depth consultation with one of our attorneys prior to choosing the mark, design, and international category for you.

We look forward to reviewing your request and will work to respond to you promptly if our firm can serve your needs.

Sincerely,

The Legal Team of Scott, Ray & Sullivan, PLLC

1. Potential Client Information

Name	First, Middle, Last	
Address	Street Name & No.	
Address	City, State, Zip	
Phone	Preferred Number and Type	
Email		
Last four digits of SSN and DL		
Company Name		
State of Company Formation		
Type of Entity (LLC, S-Corp, etc.)		

2. Strategic Estate Planning

Do you want to discuss ways to avoid probate, protect your assets, or other estate planning strategies?

Yes		No	
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If you do not have a business entity, are you interested in forming one to own your trademark?

Yes		No	
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3. Information about your Mark

Name of Potential Mark (words only)

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Have you used your mark in the stream of commerce?

Yes		No	
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If so, what date was it first used in commerce?

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What is the website address for your goods or service?

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Please list approximately three competitive products or services and their websites.

Competitor 1 Name	
Competitor 1 Website	
Competitor 2 Name	
Competitor 2 Website	
Competitor 3 Name	
Competitor 3 Website	

Please list businesses, goods, or services that use a similar name and/or design for its logo.

Business/Goods/Services 1	
Business/Goods/Services 2	
Business/Goods/Services 3	
Business/Goods/Services 4	

Foreign countries which you have used your mark in the stream of commerce in that foreign country.

Country 1	
Country 2	
Country 3	

Do you currently, or do you intend, to sell goods or services with your mark outside of the state which you reside?

Yes		No	
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4. Contact Information for Free Consultation

Consultation Preference	Phone		In Person	
Preferred Days of Week for Consultation				
Preferred Times of Day for Consultation				

Name of Persons Attending Consultation	
How did you hear about our firm?	

5. Please use space below to provide additional information or questions.

Please attach or enclose with this Worksheet the following two images in jpeg form:

- 1. Mark sought, including all design and color desired; and**
- 2. Photograph of goods or advertisement for services displaying the Mark on the good or advertisement for service.**

Please submit your completed worksheet and two attachments of your mark to our firm via one of the following:

Email: Kimber@ScottRayLaw.com

Fax: (903) 454-1514

Mail: PO Box 1353, Greenville, Texas 75403-1353

Need help or have questions about this form?

Contact Kimber Patterson at: Kimber@ScottRayLaw.com or (903) 269-3615.