



Syndicate Subscription Legal Plans

INTELLECTUAL PROPERTY — COPYRIGHT **CLIENT INTAKE QUESTIONNAIRE:**

RECEIVED A TAKEDOWN NOTICE, CEASE-AND-DESIST, OR LAWSUIT? Contact us right away — response deadlines are short. If someone is copying your work, save dated screenshots and links before contacting them.

CONFIDENTIAL. This questionnaire covers copyright registration and recordation, protecting your work from infringement, responding to infringement claims, DMCA matters, and copyright agreements (assignments, licenses, distribution, and permissions). If a question does not apply, write "N/A." If unknown, write "Unknown." Attach additional pages if needed.

NAME OF THE CLIENT:

Client type:

☐ Individual creator

☐ Business / entity

☐ Full Legal Name / Entity Name: _____

Entity type and state (if business): _____ Contact person: _____

Address: _____

City: _____ County: _____ State: _____ Zip: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Citizenship / country of residence: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — HOW CAN WE HELP?

Registration & Management:

☐ Copyright registration application

☐ Supplementary registration (correct / amplify)

☐ Record a transfer or document

☐ Copyright portfolio database & certificate archive

☐ IP inventory spreadsheet

☐ Copyright searches

Enforcement & Disputes:

☐ Someone is copying my work → Part 4

☐ I have been accused of infringement → Part 5

☐ DMCA takedown notice

☐ DMCA counter-notice

☐ Infringement notice / cease-and-desist

☐ Register a DMCA designated agent → Part 7

Agreements:

☐ Copyright assignment

☐ License / permission to use material

☐ Content distribution agreement

☐ Work-made-for-hire / contractor agreement

☐ Collaboration / co-ownership agreement

☐ Review an agreement I received



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1.1 In your own words, what do you need? _____

PART 2 — THE WORK(S)

Title	Type	Date Created	Published? (date / country)	Registered? (Reg. No.)

Types: literary / written, software / code, music composition, sound recording, visual art, photograph, video / film, website, choreography, architectural.

2.1 Does the work include pre-existing material (samples, stock images)? ☐ Yes ☐ No
If yes, explain: _____

2.2 Was any part of the work created with artificial intelligence (AI) tools? ☐ Yes ☐ No
If yes, explain: _____

The Copyright Office requires applicants to identify and exclude AI-generated material that is more than minimal. Only human-created contributions can be protected.

PART 3 — AUTHORSHIP & OWNERSHIP

Author / Creator Name	Contribution	Employee, Contractor, or Owner?	Signed Written Agreement?

3.1 Created by an employee, or under a written work-for-hire agreement? ☐ Yes ☐ No
If yes, explain: _____



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3.2 Has ownership been transferred, assigned, or licensed to anyone? ☐ Yes ☐ No

If yes, explain: _____

3.3 Current copyright owner (claimant): _____

Without a signed written assignment, a contractor or co-creator may own the copyright even if you paid for the work.

PART 4 — SOMEONE IS COPYING YOUR WORK

4.1 Who is using the work (name / company)? _____

4.2 Where (website URL, platform, store, product): _____

4.3 Date you discovered it: _____ Date use began (if known): _____

4.4 How is it being used?

☐ Exact copy

☐ Modified / derivative version

☐ Used in advertising / products for sale

☐ Posted online / social media

☐ Performed / broadcast

☐ Used without credit

4.5 Have you contacted the person or sent a takedown notice? ☐ Yes ☐ No

If yes, explain: _____

4.6 Did you ever give them permission or a license? ☐ Yes ☐ No

If yes, explain: _____

Registration is generally required before suing over a U.S. work. Statutory damages and legal fees may be available only if the work was registered before the infringement began (or within 3 months of first publication). Claims generally must be filed within 3 years.

4.7 Estimated losses or infringer's profits: \$ _____

PART 5 — YOU HAVE BEEN ACCUSED OF INFRINGEMENT

5.1 What did you receive?

☐ DMCA takedown (content removed)

☐ Cease-and-desist letter

☐ Demand for payment

☐ Lawsuit served

5.2 From whom: _____ Date received: _____

5.3 Work they claim you copied: _____

5.4 How did you use the material, and why (commentary, education, parody, commercial)? _____



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5.5 Did you have a license, permission, or purchase rights to use it? ☐ Yes ☐ No

If yes, explain: _____

5.6 Did you create your work independently without seeing theirs? ☐ Yes ☐ No

Do not contact the claimant, pay a demand, or file a counter-notice until we review it. A false counter-notice can create liability.

PART 6 — COPYRIGHT AGREEMENTS

6.1 Other party: _____ Agreement type: _____

6.2 Work(s) covered: _____

6.3 Rights granted:

☐ Exclusive

☐ Non-exclusive

Territory: _____ Term: _____ Media / formats: _____

6.4 Payment (flat fee, royalty %, advance): \$ _____

6.5 Terms to address:

☐ Credit / attribution

☐ Right to modify

☐ Right to sublicense

☐ Approval rights

☐ Termination / reversion of rights

☐ Use for AI training

☐ Audit / royalty statements

PART 7 — DMCA DESIGNATED AGENT (WEBSITE & PLATFORM OWNERS)

7.1 Website(s) / app(s) you operate: _____

7.2 Do users post content (comments, uploads, listings) on your site? ☐ Yes ☐ No

7.3 Have you registered a DMCA designated agent with the Copyright Office? ☐ Yes ☐ No

If yes — date registered / renewal due: _____

Online service providers must designate an agent to qualify for DMCA "safe harbor" protection, and the designation must be renewed every 3 years.

PART 8 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

☐ Copy / sample of the work

☐ Drafts showing creation dates

☐ Registration certificates

☐ Assignments / licenses / contracts

☐ Contractor / employment agreements

☐ Dated screenshots of infringing use

☐ Takedown / C&D letters sent or received

☐ Lawsuit papers

☐ Sales / revenue records

☐ List of trademarks & patents



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Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my copyright matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if entity): _____

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Your information will be reviewed within one hour.