



Syndicate Subscription Legal Plans

CONTRACTS CLIENT INTAKE QUESTIONNAIRE:

Please send us any contract BEFORE you sign it. If you have received a notice of default, breach, or termination, contact us immediately — contracts often have short deadlines to respond or cure.

CONFIDENTIAL. This questionnaire covers drafting new contracts, reviewing and negotiating contracts before signing, modifying existing contracts, and enforcing or defending against claims of breach. Please complete Parts 1–3 and 8–9, plus each Part (4–7) that applies. 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

☐ Corporation

☐ LLC

☐ Partnership

☐ Sole proprietor / DBA

☐ Nonprofit / Other

☐ Full Legal Name / Entity Name: _____

State of formation (if entity): _____ Authorized signer & title: _____

Address: _____

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

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — WHAT DO YOU NEED?

1.1 Services needed (check all that apply):

☐ Draft a new contract → Part 4

☐ Review a contract before signing → Part 4

☐ Negotiate terms with the other party → Part 4

☐ Modify / amend a contract → Parts 5 & 6

☐ Terminate or cancel a contract → Parts 5 & 6

☐ Interpret what a contract means → Part 5

☐ Enforce — other party breached → Parts 5 & 7

☐ Defend — I am accused of breach → Parts 5 & 7

1.2 Signing, response, or cure deadline (if any): _____

1.3 In your own words, what is the situation and what do you want to achieve? _____



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PART 2 — TYPE OF CONTRACT

2.1 Contract type:

- | | |
|--|--|
| ☐ Services / consulting | ☐ Sale of goods / purchase order |
| ☐ Independent contractor | ☐ Employment / offer letter |
| ☐ Non-disclosure (NDA) | ☐ Non-compete / non-solicitation |
| ☐ Partnership / operating / shareholder | ☐ Loan / promissory note |
| ☐ Lease (commercial or residential) | ☐ Licensing / intellectual property |
| ☐ Purchase or sale of a business | ☐ Franchise / distribution |
| ☐ Supply / vendor / manufacturing | ☐ Software / SaaS / website |
| ☐ Settlement / release | ☐ Other |

2.2 Estimated total value of the contract: \$ _____ Duration: _____

2.3 Current form of the agreement:

- | | |
|---|---|
| ☐ Fully written and signed | ☐ Written but not signed |
| ☐ Emails / texts / purchase orders | ☐ Oral only |
| ☐ Not yet created | |

PART 3 — THE PARTIES

Party Name	Role (buyer, seller, provider, lender, etc.)	Individual or Entity (type & state)	Signer / Contact

3.1 Is anyone guaranteeing performance (personal guaranty)? ☐ Yes ☐ No

If yes, explain: _____

3.2 Does the other party have a lawyer or legal representative? ☐ Yes ☐ No

If yes — Name / Firm / Phone: _____

3.3 Your relationship with the other party (new, long-term, family, competitor): _____

PART 4 — DRAFTING, REVIEW & NEGOTIATION

4.1 Purpose of the contract and what each party will provide (scope of work / goods / deliverables): _____



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4.2 Price / compensation: \$ _____ Payment schedule: _____

Deposit / retainer: \$ _____ Late fees / interest: _____

4.3 Start date: _____ End date / term: _____ Renewal: _____

4.4 Terms to Address (check those important to you):

- | | |
|---|---|
| ☐ Termination rights & notice | ☐ Exclusivity |
| ☐ Confidentiality | ☐ Non-solicitation / non-compete |
| ☐ Ownership of work product / IP | ☐ Warranties & guarantees |
| ☐ Indemnification | ☐ Limitation of liability |
| ☐ Insurance requirements | ☐ Liquidated damages / penalties |
| ☐ Legal fees to prevailing party | ☐ Arbitration / mediation |
| ☐ Governing law & venue | ☐ Assignment / change of control |
| ☐ Force majeure | ☐ Electronic signatures |

4.5 Your "must-haves" and deal-breakers: _____

4.6 Terms in the draft that concern you (reference section numbers if reviewing): _____

4.7 Negotiating position:

- | | |
|--|-----------------------------------|
| ☐ We have more leverage | ☐ Balanced |
| ☐ Other party has more leverage | ☐ Not sure |

4.8 Is there a template or prior agreement you want us to use? ☐ Yes ☐ No

PART 5 — EXISTING CONTRACT

5.1 Date signed / formed: _____ Effective date: _____

5.2 Did all parties sign? ☐ Yes ☐ No

5.3 Have there been amendments, side letters, or verbal changes? ☐ Yes ☐ No

If yes, explain: _____

5.4 Current status: _____ Time remaining on term: _____

5.5 Does the contract require changes to be in writing and signed? ☐ Yes ☐ No

5.6 Does it contain an arbitration, venue, or choice-of-law clause? ☐ Yes ☐ No

5.7 Does it allow the winning party to recover legal fees? ☐ Yes ☐ No



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5.8 If there is a disagreement about what the contract means, which provisions and what does each side claim?

PART 6 — MODIFICATION OR TERMINATION

6.1 What change do you want (price, scope, schedule, term, parties) and why? _____

6.2 Does the other party agree?

☐ Yes, agrees

☐ Open to discussing

☐ Opposes

☐ Not yet asked

6.3 Does the contract allow either party to terminate? ☐ Yes ☐ No

If yes — notice required and conditions: _____

6.4 Are there penalties or fees for early termination? ☐ Yes ☐ No

If yes, explain: _____

6.5 Is new consideration (payment, benefit) being offered for the change? ☐ Yes ☐ No

PART 7 — BREACH & ENFORCEMENT

7.1 Who is accused of breaching?

☐ The other party

☐ Me / my business

☐ Both sides claim breach

7.2 What obligation was not performed (non-payment, late delivery, defective work, confidentiality breach, etc.)? _____

7.3 Date of breach: _____ Date discovered: _____

Deadlines to sue in California are generally about 4 years for written contracts and 2 years for oral contracts, usually from the date of breach.

7.4 Was written notice of breach or default sent or received? ☐ Yes ☐ No

If yes — date, who sent it, and any cure period: _____

7.5 Response from the other side (explanations, excuses, counterclaims): _____



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7.6 Have you fully performed your own obligations under the contract? ☐ Yes ☐ No

If yes, explain: _____

7.7 Damages / Losses:

Type of Loss	Amount \$
Unpaid amounts owed	
Cost to hire a replacement / cover	
Lost profits	
Property damage / defective goods	
Other costs incurred	

7.8 Have you taken steps to reduce your losses (mitigation)? ☐ Yes ☐ No

If yes, explain: _____

7.9 Is there a lawsuit, arbitration, or demand letter already pending? ☐ Yes ☐ No

If yes, explain: _____

PART 8 — DESIRED OUTCOME

8.1 What outcome do you want?

☐ Signed contract that protects me

☐ Other party performs as promised

☐ Payment of money owed

☐ Renegotiated terms

☐ Terminate / exit the contract

☐ Undo the contract (rescission)

☐ Damages / compensation

☐ Mediation / settlement

8.2 Budget / timeline considerations: _____

PART 9 — DOCUMENT CHECKLIST

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

☐ Contract / draft / term sheet

☐ Amendments / change orders

☐ Proposals, quotes, purchase orders

☐ Invoices & payment records

☐ Emails, texts, letters

☐ Notices of breach / termination

☐ Templates or prior agreements

☐ Entity documents (if business)

☐ Photos / evidence of defects

☐ Demand letters / court papers



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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, and that I am authorized to provide it on behalf of the client named above. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my contract matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if signing for entity): _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.