



Syndicate Subscription Legal Plans

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

PATENT DEADLINES CANNOT BE MISSED. In the U.S., you generally have only 1 year after publicly disclosing, selling, or offering your invention to file a patent application, and most foreign countries allow no grace period at all. Contact us before disclosing your invention publicly, and send us any USPTO correspondence immediately.

CONFIDENTIAL. This questionnaire helps us understand your invention, identify deadlines, and coordinate searches, filings, and docketing with the USPTO and foreign associates. Information you provide is kept confidential. Do not post or publish details of your invention while we evaluate it. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

Client type:

☐ Individual inventor ☐ Business / entity ☐ University / nonprofit

☐ 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: _____

Preferred method of contact:

☐ Phone ☐ Text ☐ Email

PART 1 — HOW CAN WE HELP?

1.1 Check all that apply:

- | | |
|--|---|
| ☐ Patent search / patentability review | ☐ Provisional patent application |
| ☐ Utility (non-provisional) application | ☐ Design patent application |
| ☐ International (PCT) / foreign filing | ☐ Continuation / CIP / divisional |
| ☐ Respond to a USPTO office action | ☐ Information Disclosure Statement (IDS) |
| ☐ Docketing & deadline tracking | ☐ Patent term adjustment review |
| ☐ Maintenance fee tracking | ☐ Record an assignment |
| ☐ Patent licensing agreement | ☐ Someone is infringing my patent |
| ☐ I have been accused of infringement | ☐ Reexamination / post-grant challenge |

1.2 Nearest deadline (filing, response, conversion, maintenance): _____

PART 2 — THE INVENTION

2.1 Working title of the invention: _____

2.2 Technical field (e.g., medical device, software, consumer product): _____



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2.3 What problem does the invention solve? _____

2.4 Briefly, how does it work? (Describe the key parts or steps.) _____

2.5 What is new or different compared with existing products or methods? _____

2.6 Stage of development:

☐ Idea / concept

☐ Drawings / design

☐ Working prototype

☐ In production / on the market

2.7 Are you aware of similar products, patents, or publications? ☐ Yes ☐ No

If yes, explain: _____

2.8 Do you have drawings, CAD files, photos, or code? ☐ Yes ☐ No

PART 3 — INVENTORS & OWNERSHIP

Inventor Name	Citizenship	City / Country of Residence	Contribution	Employer

Everyone who contributed to at least one claimed inventive idea must be named as an inventor. Naming the wrong inventors can invalidate a patent.

3.1 Did any inventor sign an agreement assigning inventions to an employer? ☐ Yes ☐ No

If yes, explain: _____

3.2 Was the invention developed using university, government, or grant funding? ☐ Yes ☐ No

If yes, explain: _____

3.3 Who should own the patent (assignee)? _____



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3.4 Are there co-owners, investors, or partners with rights in the invention? ☐ Yes ☐ No

If yes, explain: _____

PART 4 — DISCLOSURE & SALES TIMELINE (CRITICAL)

Event	Date	Details / Where
Date invention was first conceived		
First public disclosure (talk, article, website, social media, video)		
First crowdfunding or investor pitch without an NDA		
First trade show / demonstration		
First offer for sale		
First sale		
First public use		

4.1 Have all people who saw the invention signed non-disclosure agreements? ☐ Yes ☐ No

4.2 Do you plan to disclose or sell the invention soon? When? ☐ Yes ☐ No

If yes, explain: _____

PART 5 — EXISTING APPLICATIONS & PATENTS

Application / Patent No.	Type (provisional, utility, design, PCT)	Filing Date	Status	Next Deadline

5.1 Did you receive an office action, notice, or rejection from the USPTO? ☐ Yes ☐ No

If yes — date mailed and response due: _____

A provisional application expires 12 months after filing. A non-provisional (and any foreign / PCT) application claiming its date must be filed before then.

5.2 USPTO entity size (affects fees):

☐ Micro entity ☐ Small entity ☐ Large entity ☐ Not sure



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PART 6 — INTERNATIONAL PROTECTION

6.1 Do you want protection outside the United States? ☐ Yes ☐ No

Countries / regions of interest: _____

6.2 Where will the product be made and sold? _____

PART 7 — INFRINGEMENT & DISPUTES

7.1 Situation:

☐ Someone may be infringing my patent ☐ I received a notice / demand letter

☐ I have been sued ☐ Licensing dispute

7.2 Other party: _____ Patent No. involved: _____

7.3 Product / process involved: _____

7.4 Date you learned of the issue: _____ Response deadline: _____

7.5 Is there an existing lawsuit, reexamination, or post-grant proceeding? ☐ Yes ☐ No

If yes, explain: _____

Do not respond to a demand letter or contact the other party until we review it.

PART 8 — COMMERCIALIZATION & BUDGET

8.1 Plans for the invention:

☐ Manufacture & sell myself ☐ License to a company

☐ Sell the patent ☐ Raise investment

☐ Defensive protection only ☐ Not sure

8.2 Budget for searches, filings, and fees: \$ _____

8.3 Has any company expressed interest in licensing or buying the invention? ☐ Yes ☐ No

If yes, explain: _____

PART 9 — DOCUMENT CHECKLIST

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

☐ Invention description / notes

☐ Drawings, CAD files, photos

☐ Lab notebooks / dated records

☐ Known prior art / competing products

☐ NDAs signed

☐ Employment / assignment agreements

☐ USPTO filings & correspondence

☐ Foreign / PCT filings

☐ License agreements

☐ 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 have disclosed all known inventors, prior disclosures, and sales. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my patent 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.