



Syndicate Subscription Legal Plans

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

Send us any USPTO office action, deadline notice, or cease-and-desist letter right away. Beware of official-looking letters and invoices from private companies demanding "registration" or "renewal" fees — confirm with us before paying.

CONFIDENTIAL. This questionnaire covers trademark and service mark searches, federal and state filings, maintenance and renewals, portfolio management, trademark agreements, due diligence, and enforcement. If a question does not apply, write "N/A." If unknown, write "Unknown." Attach additional pages if needed.

NAME OF THE CLIENT (MARK OWNER):

Owner type:

☐ Individual

☐ Corporation

☐ LLC

☐ Partnership

☐ Other entity

☐ Full Legal Name / Entity Name: _____

State / country of formation or citizenship: _____ Contact person: _____

Address (domicile): _____

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

Phone: _____ Email: _____

Syndicate Plan Member ID: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Applicants whose principal place of business or home is outside the U.S. must be represented at the USPTO by a U.S.-licensed attorney.

PART 1 — HOW CAN WE HELP?

Searches & Filings:

☐ Trademark clearance search

☐ International search

☐ Federal (USPTO) application

☐ State trademark / service mark filing

☐ Trade name / DBA / business certificate

☐ Statement of use / extension of time

☐ Respond to a USPTO office action

☐ Declaration of use & incontestability

☐ Renewal

☐ Portfolio docketing & renewal tracking

Agreements & Transactions:

☐ Trademark assignment

☐ Trademark license agreement

☐ IP security agreement

☐ Coexistence / consent agreement

☐ IP portfolio audit (before / after purchase)

☐ IP spreadsheet & e-files



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Enforcement & Disputes:

☐ Someone is using my mark → Part 7

☐ I received a cease-and-desist → Part 7

☐ Opposition / cancellation proceeding

☐ Domain name / marketplace dispute

PART 2 — THE MARK

2.1 Mark (exact wording): _____

2.2 Type of mark:

☐ Word mark (standard characters)

☐ Logo / design

☐ Word + logo combined

☐ Slogan / tagline

☐ Sound / color / other

2.3 Are specific colors, fonts, or stylization part of the mark?

☐ Yes ☐ No

If yes, explain: _____

2.4 Meaning / translation of any foreign or coined words: _____

2.5 Does the mark include a person's name, signature, or likeness?

☐ Yes ☐ No

Using a living person's name or likeness requires that person's written consent.

2.6 Did an outside designer create the logo? Is there a written assignment?

☐ Yes ☐ No

If yes, explain: _____

PART 3 — GOODS & SERVICES

3.1 Describe the products and / or services sold under the mark: _____

3.2 Trademark classes (if known): _____

3.3 Where are they sold or offered?

☐ Retail stores

☐ Online / e-commerce

☐ Amazon / marketplaces

☐ Wholesale / distributors

☐ Social media

☐ Other

PART 4 — USE OF THE MARK

4.1 Status of use:

☐ Currently in use

☐ Not yet in use — intend to use

☐ Used in the past, no longer used



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4.2 Date of first use anywhere: _____

Date of first use across state lines (interstate commerce): _____

4.3 States / countries where used: _____

4.4 Examples (specimens) of use you can provide:

☐ Product labels / tags / packaging

☐ Website / online store screenshots

☐ Advertising / brochures

☐ Signage / menus

☐ None yet

An intent-to-use application reserves the mark before use, but actual use must be shown before the registration issues.

PART 5 — SEARCH & POSSIBLE CONFLICTS

5.1 Have you searched for similar marks already in use or registered? ☐ Yes ☐ No

5.2 Anyone using a similar name or logo for related goods / services? ☐ Yes ☐ No

If yes, explain: _____

5.3 Domain names / social media handles owned: _____

5.4 Business entity or DBA using the name: _____

PART 6 — EXISTING APPLICATIONS & REGISTRATIONS

Mark	Serial / Reg. No.	Where (USPTO / State / Foreign)	Status	Next Deadline

Registrations must be maintained with a declaration of use between the 5th and 6th years and renewed every 10 years. Missing a deadline can cancel the registration.

6.1 Do you want protection outside the U.S. (e.g., Madrid Protocol)? ☐ Yes ☐ No

Countries / regions: _____

PART 7 — ENFORCEMENT & DISPUTES

7.1 Situation:

☐ Someone is using a similar mark

☐ Counterfeit products

☐ Received a cease-and-desist

☐ Opposition / cancellation filed

☐ Domain name dispute

☐ Marketplace takedown / listing dispute

7.2 Other party: _____ Their mark / product: _____

7.3 Where used (URL, store, marketplace): _____



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7.4 Date discovered: _____ Response deadline: _____

7.5 Is the other party using the mark in the same industry or market as you? ☐ Yes ☐ No

Do not respond to a cease-and-desist letter or contact the other party until we review it.

PART 8 — AGREEMENTS & DUE DILIGENCE

8.1 Other party to agreement: _____ Type: _____

8.2 Marks involved: _____

8.3 License terms to address:

☐ Exclusive license

☐ Non-exclusive license

☐ Quality control provisions

☐ Royalties

☐ Territory limits

☐ Termination rights

8.4 Is this part of a business purchase, sale, or financing? ☐ Yes ☐ No

If yes, explain: _____

PART 9 — DOCUMENT CHECKLIST

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

☐ Logo files (high resolution)

☐ Specimens (labels, website screenshots)

☐ Existing registrations / filings

☐ USPTO office actions / notices

☐ Designer / contractor agreements

☐ Assignments / licenses

☐ Cease-and-desist letters

☐ Evidence of infringing use

☐ Business formation / DBA documents

☐ Search reports

Certification:

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

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Title (if entity): _____

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