

# CONTRACT PROJECT INTAKE SHEET

Today's Date \_\_\_\_\_

## Hiring Attorney

Hiring Attorney's Full Name \_\_\_\_\_

Firm Name \_\_\_\_\_

Street Address \_\_\_\_\_

City/State \_\_\_\_\_ Zip \_\_\_\_\_ Email Address \_\_\_\_\_

Telephone \_\_\_\_\_ Fax \_\_\_\_\_

Referred by \_\_\_\_\_

## Conflict Control

Names of all Parties and Potential Parties:

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_

## Project Information and Deadlines

Nature of Contract Project \_\_\_\_\_

\_\_\_\_\_

Work Product Format/Delivery \_\_\_\_\_

\_\_\_\_\_

Deadlines \_\_\_\_\_

## Billing, Terms of Payment, and PLF Coverage

Hourly Rate \_\_\_\_\_ or Flat Project Rate \_\_\_\_\_

Billing/Payment Terms \_\_\_\_\_

\_\_\_\_\_

Retainer \_\_\_\_\_ Retainer Received \_\_\_\_\_

PLF Coverage Required \_\_\_\_\_ PLF Coverage Obtained \_\_\_\_\_

Copy of File/Pertinent Documents Received \_\_\_\_\_

Letter of Understanding Needed \_\_\_\_\_

Other \_\_\_\_\_

File Opened by \_\_\_\_\_ Conflicts Checked by \_\_\_\_\_  
by \_\_\_\_\_

Deadlines

Docketed

Letter of Understanding Sent by \_\_\_\_\_ Date \_\_\_\_\_

## IMPORTANT NOTICES

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