



CONTRACT REVIEW CLIENT INTAKE FORM

Disclaimer: Thank you for your interest in being a client of
Information collected about new clients is confidential and will be treated accordingly.

PLEASE COMPLETE ONE (1) INTAKE FORM PER CONTRACT. Contracts submitted for review must be attached to this form. If submitted electronically, contracts must be attached in a modifiable format that may be edited electronically.

CLIENT INFORMATION

Client Name: _____ Entity Type: _____

EIN / Federal Tax Identification Number: _____

Street Address: _____

City: _____ State: _____ ZIP Code: _____

Company Website: _____

Describe the nature of your business: _____

Contact Person Information

Contact Name: _____ Job Title: _____

Primary Phone: _____ Secondary Phone: _____

E-Mail: _____ Fax: _____

CONTRACT INFORMATION

Contract Type: _____ Contract Term: _____

Anticipated Contract Value: \$ _____

Date Submitted for Review: _____ Requested Deadline: _____

Explain any deadline or time frame issues:

List the specific sections of the contract that you're unsure of and would like us to address:

List any sections or language that you would like us to add to your contract:

List and provide copies of, or links to any policies, regulations, or laws that were relied on in developing your contract:

List and attach the main contract document(s) and each attachment or exhibit to those document(s). If particular contract provisions are problematic or were difficult to negotiate, indicate those provisions and explain the issue below.

Document Name	No. of Pages	Troublesome Provisions?
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

Explain the troublesome provisions indicated above (if any):

Provide any other information that may assist us in the review of your contract:

SIGNATURE

Client Signature: _____ Date: _____

Print Name: _____

Title: _____