

Patent Client Pre-Qualification Form

Full Name: _____

Date: _____

Name / Company: _____

Email / Phone: _____

Step 1: Knowledge Level

- Beginner – I have little to no knowledge of patents.
- Advanced – I have filed patents or currently own IP.

Step 2: For Beginners (If you checked Beginner, please complete this section)

1. What do you want to protect?

- Idea / Invention
- Brand Name / Logo
- Creative Work

2. Briefly describe your invention or brand:

3. Have you checked if it already exists? Yes No

4. What is your main goal for protection?

- Stop competitors
- Attract investors
- License or sell IP
- Increase company value

5. Do you have drawings, prototypes, or written descriptions? Yes No

Step 3: For Advanced Clients (If you checked Advanced, please complete this section)

1. Do you currently own patents?

- Yes – Granted
- Yes – Pending
- No

2. Type of application(s):

- Provisional
- Non-provisional
- PCT / International
- Continuation / Divisional

3. Have you done FTO (Freedom to Operate) research? Yes No

4. What countries are you seeking protection in?

5. What are your strategic goals?

- Licensing / Monetization
- Portfolio expansion
- Enforcement / Litigation
- Investor requirements

Step 4: Next Steps

Our team will review your answers and contact you to schedule a consultation.

Signature: _____

Date: _____