**General Firm Information**

|  |  |  |
| --- | --- | --- |
| *Name* | *Date Established* | *Address* |
|   |   |   |

**General Firm Internal Control Information**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *# Docket control systems the firm maintains* | *Is docket control system computerized?* | *Does the firm maintain a conflict of interest system check?* | *Is it computerized?* | *Does the firm use engagement, disengagement, & non-engagement letters?* |
| Choose an item. | Choose an item. | Choose an item. | Choose an item. | Choose an item. |

**Attorney Information**

|  |  |  |  |  |
| --- | --- | --- | --- | --- |
| *Attorney Name* | *Year Bar Passed* | *Retroactive Date* | *Is an ‘Of Counsel’ or Independent Contractor (IC)* | *If ‘Of Counsel’ or IC, # hours worked per week* |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |
|   |   |   |   |   |

**Current Insurance Information**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| *Carrier* | *Limits* | *Deductible* | *Premium* | *Effective Date* | *# Years Insured* |
|   |   |   |   |   | Choose an item. |

**Claim History Information**

|  |  |  |
| --- | --- | --- |
| *Are you aware of any claims against you or the firm in the past 5 years?* | *Are you aware of any incident that could give rise to a claim in the last 5 years?* | *Has any member of the firm been refused to practice, disbarred, suspended, reprimanded, sanctioned, or held in contempt by the court administrative agency or regulatory body?* |
| Choose an item. | Choose an item. | Choose an item. |

**Areas of Practice**

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Administration |  % | Copyright/Trademark | % | Insurance | % | School Law | % |
| Admiralty/Maritime |  % | Corporate-Formation | % | Investments/Money Mgmt | % | Securities | % |
| Antitrust/Trade Regulation |  % | Corporate-General | % | Labor Law/Management | % | Social Security/Elder Law | % |
| Arbitration/Mediation |  % | Criminal | % | Labor Law/Union | % | Tax/Corporate | % |
| Banking/Financial Inst. |  % | Domestic Relations/Family | % | Mergers & Acquisitions | % | Tax/Individual | % |
| Bankruptcy |  % | Employee Benefits | % | Municipal | % | Water Rights | % |
| BI/PI Defense |  % | Entertainment/Sports | % | Oil/Gas/Minerals | % | Work Comp/Defense | % |
| BI/PI Plaintiff |  % | Environmental | % | Patent | % | Work Comp/Plaintiff | % |
| Civil Rights/Discrimination | % | Estates/Probate/Wills/Trusts | % | Public Utilities | % | Class Action/Mass Tort | % |
| Collection/Repossession | % | Foreign/International | % | Real Estate-Commercial | % | Other (Explain) | % |
| Communication/FCC | % | Healthcare | % | Real Estate-Residential | % | TOTAL  | 100% |