

Initial Consultation Checklist

Name of Patent Attorney	
Firm	
Phone Number	
Email	
Date	
How we found this attorney	

		OK
Practice Area	Does this attorney work in my area of technology? A related one?	
	Does this attorney feel they can handle my product's technology?	
	Does this attorney know of any specific patent law issues relating to my type of product? (may or may not be any)	
	Is this attorney's undergraduate or graduate degree particularly relevant?	
	Ask about the attorney's work history before becoming a lawyer, if applicable.	
	NOTES:	
Pricing	Does this attorney offer flat fees for certain projects?	
	Does this attorney offer "not-to-exceed" estimates?	
	Does this attorney offer subscription-based services?	
	If the attorney charges an hourly rate, what is that rate?	
	Does this attorney have a retainer requirement?	
	Ask what the attorney typically charges for preparing and filing a patent application.	
	Ask what is included in the quoted cost estimate. (Illustrations? Filing fees?)	
	NOTES:	
Personality	Does this attorney have experience working with companies like yours?	
	Does this attorney seem to be well-versed in patent strategy?	
	Does this attorney seem to be able to talk to you about business considerations and not just about patent law?	
	Does this attorney seem like they'd be good at working with engineers or technicians like the ones at your company?	
	Do you think you'd be able to work with this attorney over a multi-year patent preparation and examination process?	
	Does the attorney seem professional but approachable?	
	Any red flags, personality-wise?	
	NOTES:	