



**LAWYERS PROFESSIONAL LIABILITY**

**COPYRIGHT, PATENT AND TRADEMARK SUPPLEMENTAL APPLICATION**

1. Provide a percentage breakdown of the firm's copyright, patent and trademark practice into the following categories:

Intellectual Property Practice	Domestic		Foreign	
	Past 12 Months	5 year average	Past 12 Months	5 year average
a. Intellectual Property Litigation				
b. Patent Infringement Counseling				
c. Patent Licensing				
d. Patent Prosecution				
e. Trademark Prosecution				
f. Trademark Registration/Licensing				
g. Copyright Registration/Licensing				
h. Patent Searches				

2. Provide the following for the firm's largest five Intellectual Property clients:

Type of Business	Sales Per Year	Number of Patents Held or Pending	Legal Services Provided	Year Legal Services Began

3. List the names of all lawyers engaged in Intellectual Property services during the last six years:

Name	Practice Specialty	Years in this Specialty	Percentage of Time Billed for the Past 12 Months	Average Annual percentage of Time for the Past Six Years

4. Are engagement, nonengagement and disengagement letters provided to all Intellectual Property clients? .....Yes  No
- a. Does the engagement letter outline the nature, scope and limitations of the firm's representation? .....Yes  No
- b. Is the responsibility for payment of maintenance fees, taxes or annuities clearly stated? .....Yes  No
5. Does the firm have a computerized docketing system to alert the appropriate responsible party specific to:
- a. statutory bar dates? .....Yes  No
- b. fee due dates, whether outsourced or not? .....Yes  No
- c. response dates? .....Yes  No
6. Who reviews the docket entries for accuracy? Check all that apply.  
Billing Partner  Partner in Charge of Work  Associate  Paralegal  Secretary
7. Does the firm outsource to other entities for Searches or Payment of Maintenance / Annuity Fees: .....Yes  No
- a. Does the firm verify that the outsource entity carries professional liability insurance coverage? .....Yes  No
- b. Does the firm obtain proof of insurance, such as a certificate of insurance? .....Yes  No
8. How does the firm choose an outsource entity? Check all that apply.  
Review of Work Product  Recommendations from Other Firms  Yellow Pages  Advertisements
9. Does the conflict avoidance system cross-check for conflicts between previous and existing clients? .....Yes  No
- a. Is sign off by all attorneys required before a new client can be accepted? .....Yes  No
- b. Does the firm allow equity interests with firm clients? .....Yes  No
- c. Does any firm member or spouse have a position or equity interest with an Intellectual Property client? .....Yes  No
- d. Has any firm member ever received or accepted royalties or shares in lieu of fees for services? .....Yes  No
10. Are Opinion letters issued by the firm reviewed by at least one other attorney not associated with the matter?.....Yes  No
11. Are client's advised in writing to mark the patented/trademarked product with the appropriate number or notice? ..Yes  No

