

# New Matter Memo

Prepared by: Your Name

Reason for Form - Choose One:

Date: February 23, 2001

CHECK ALL THAT APPLY:

ALL ITEMS

Client Information

Matter Information

File Information

Marketing Information

Request for Points Only

## CLIENT

CLIENT NUMBER

CLIENT NAME (Last, First, Middle Initial)

TITLE/POSITION HELD IN CO.:

Choose One:

PROFESSIONAL DESIGNATION (IF ANY):

Choose One:

KEY PURCHASER OF LEGAL SERVICES?:

No

Yes

ORIGINATING ATTY. FOR THIS CLIENT:

OTHER ATTYS. FOR THIS CLIENT

BILLING ADDRESS (As It Will Appear On Invoice):

Name:

Billing Contact Name:

Address: Street Address  
Suite or Floor  
City

Telephone Number:  
Fax Number:  
State  
E-Mail Address  
Website

Zip Code

Secondary Address(es):

BUSINESS TYPE:

Choose One:

BUSINESS ENTITY:

Choose One:

CO. ANNUAL REVENUE:

Choose One:

NO. OF EMPLOYEES:

Choose One:

PRACTICE AREA(S):

Choose One:

INDUSTRY GROUP(S):

Choose One:

REFERRAL SOURCE:

Choose One:

THIS MATTER CAME TO US  
BECAUSE...

Choose One:

## MATTER(S)

MATTER NUMBER

ORIGINATING ATTYS FOR THIS MATTER

MATTER DESCRIPTION

%

RESPONSIBLE ATTY.:

%

BILLING ATTY:

%

BILLING FORMAT:

Choose One:

TOTAL 100%  
%

SPEC. BILLING INSTR:

DIFFERENT MAILING

ADDRESS FOR MATTER:

LAW PRACTICE AREA:

Choose One:

Combined Bill:

No

Yes

PRACTICE AREA SUB-  
CODE:

Choose One:

**BILLING COMMITTEE APPROVAL (Required for all new Clients)** \_\_\_\_\_

APPROVAL by \_\_\_\_ --For Special Billing Rates or Special Billing Instructions

If you need a file, provide extra copy of form for File Room

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## FILES

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FILE NAME: FILE NO.:  
RE: RETURN FILE TO:  
CROSS REFERENCE: ADDITIONAL CARDS:  
POINTS REQUIRED: Standard File Options: Custom File Points or New Points

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## MARKETING INFORMATION

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PRACTICE GROUP(S): **Pick Option:**  
SERVICE(S): **Pick Option:**  
INDUSTRY(S): **Pick Option:**  
SPECIAL INTEREST(S): **Pick Option:** International, Multiple Jurisdictions, Gov't Relations, etc.  
CLIENT TYPE: **Pick Option:** Small, Medium, Large, Mega  
CLIENT RATING: **Pick Option:** Potential for future business  
MAILING LIST(S) : **Pick Option:**  
MAILING PREFERENCE: **Pick Option:** Text, HTML, etc.  
EVENT INVITATION(S): **Pick Option:**  
CLIENT FEEDBACK PROGRAM: **Pick Option:**  
OTHER: **Pick Option:**

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