

# SAMPLE NEW CLIENT / NEW MATTER MEMO



Date: \_\_\_\_\_

New Client

New Matter

Prospective Client Name: \_\_\_\_\_

Prospective Client Affiliates:

\_\_\_\_\_  
\_\_\_\_\_

Description of Matter:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Adverse Party and Affiliates:

Opposing Counsel:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Responsible Attorney: \_\_\_\_\_

Office sign off (initials):

Attorneys

Staff

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Note: File cannot be opened until entire office has signed off. If anyone is aware of any relevant information that is appropriate to share or has a potential personal or business interest conflict related to this matter or any name listed above, please immediately bring to the attention of the responsible attorney.

Date Names Entered in Conflict System: \_\_\_\_\_ By: \_\_\_\_\_

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