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Intake Form: Trademarking a Business Name

This form will help you collect the information you need to present to your attorney in order to trademark or service mark your business name.

Client Information

Contact name: _____

Position: _____

Business Name: _____

Address: _____

Telephone: _____ Fax: _____

Mobile: _____ E-mail: _____

Business' legal status:

_____ Individual _____ Partnership

_____ Corporation (type: _____)

If business is a partnership:

Name of each general partner: _____

If business is a corporation:

State of incorporation: _____

Description of Use of Mark

What goods will the mark be used on or in connection with? _____

(The goods should be identified in clear and precise language, e.g., "computer programs for use by accountants," or "retail food store services.")

What services will the mark be used in connection with? _____

In what manner will the mark be used on or in connection with goods or services?

On labels attached to goods? _____

In advertisements for services? _____

Other (describe)? _____

In interstate commerce? _____

In commerce between United States and specified foreign country or countries? _____

What is the class number(s) of the goods or services you will use the mark in connection with? _____

Dates of Mark's Use

If mark has been used in commerce:

When was the mark first used in commerce? _____

When was the mark last used in commerce, if not currently in use? _____

If mark has not been used in commerce:

What facts evidence your bona fide, good-faith intent to use mark in commerce? _____

When do you plan to use mark in commerce? _____

Other Uses of Mark

Will any other entity be using mark? _____

If so:

What is the entity's name and owners: _____

What is the entity's address and telephone number? _____

Does this entity control your business, or does your business control the entity, with regard to the nature or quality of goods or services in connection with which the mark is or will be used? _____

Has the mark ever been used and discontinued? _____

If so:

What were the dates and time period of nonuse? _____

Describe conditions of nonuse? _____

Reason for nonuse? _____

Has there or will there be an assignment of the mark? _____

Has the mark been denied registration previously? _____

If yes:

What is the date of the denial? _____

What were the reasons for denial? _____

Has registration of the mark ever been formally opposed? _____

If yes:

In what type of proceeding (opposition, petition to cancel registration, interference, or judicial proceeding)? _____

What was the date of the previous application(s)? _____

What is the name and address of the opposing person or entity? _____

What was the reason for opposition? _____

What was the disposition of the proceeding? _____

What is the possibility of further future opposition? _____

Are you aware of any other person or entity who believes that he or she has been or would be damaged by registration of the mark, such as a competitor using a similar mark? _____

If yes:

What is the name and address of that person or entity? _____

Has this person ever filed or threatened to file a petition to cancel registration? _____

Has concurrent registration of the mark been previously allowed? _____

If yes:

What was the date of previous registration? _____

Is the registration is still in effect? _____

Who is the owner of other concurrently registered mark? _____

Is the mark now or has it ever been registered on the supplemental register? _____

If yes:

What is the date of registration? _____

What was the basis for registration (distinguishing goods or services in commerce for one year, or distinguishing goods or services in commerce and foreign protection required for mark)? _____

Have you already applied for federal registration of mark on the basis of intent to use? _____

If yes:

What is the date the application was filed? _____

What is the date the notice of allowance was issued? _____

Which particular goods and/or services mark has been used on or in connection with commerce? _____

What kind of ongoing efforts have you made to use the mark in commerce:

_____ Product or service research or development?

_____ Market research?

_____ Manufacturing activities?

_____ Promotional activities?

_____ Steps to acquire distributors?

_____ Steps to obtain required governmental approval.?

_____ Other, similar activities (describe) _____

Have you previously requested and received extension(s) of time in which to file statement of use? _____

If so, when? ____