BUSINESS ATTORNEY INTAKE / 01

BUILD THE PRIVATE INTAKE INDEX

Use neutral labels and broad decision areas; keep confidential facts and documents elsewhere.

A helpful preparation resource from PickYourPro.ai. Fill in digitally or print. Keep your completed copy private.

Business A / broad stage or activity / no legal name or ownership detail

Matter A / broad decision area / no allegation, term or legal conclusion

Business objective / authorized internal decision owner

Private Record A / category and secure location kept elsewhere

Known meeting or business milestone / attorney to confirm any legal timing

Most important consultation question / why a decision is needed

Preparation only. Not legal, tax, accounting, securities, employment, IP, contract, compliance, filing, deadline, dispute or outcome advice. No attorney-client relationship. Keep confidential facts and records out.

BUSINESS ATTORNEY INTAKE / 02

MAP QUESTIONS AND PRIVATE HANDOFFS

Plan what to ask and how private material could be reviewed after conflicts and engagement status are clear.

Decision area / attorney question / internal owner

Private fact category / secure handoff method to confirm

Document category / who controls access / no contents here

Other professional or authority question / responsible source

Possible deliverable / attorney to define / acceptance owner

Uncertainty, dependency or follow-up / written clarification needed

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BUSINESS ATTORNEY INTAKE / 03

CHECK THE CONSULTATION PACKET

Tick what is organized. These checks do not create representation or decide a legal issue.

- [ ] Neutral business, matter and record labels are used
- [ ] No identities, figures, terms, allegations or documents are recorded
- [ ] Business objectives are separate from legal conclusions
- [ ] Each question has an authorized internal decision owner
- [ ] Private record categories are indexed without content
- [ ] Conflicts, confidentiality and engagement status will be discussed
- [ ] Written scope, exclusions, staffing and communication terms are requested
- [ ] Both attorneys receive the same non-sensitive preparation brief

Highest-priority business decision question still open

Private fact or record category still awaiting secure handoff instructions

Engagement scope, staffing or communication term still unclear

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BUSINESS ATTORNEY INTAKE / 04

QUESTIONS FOR THE BUSINESS ATTORNEY

Ask each attorney the same private-intake, scope, staffing and engagement questions.

Routing: which decision areas fit this consultation and which do not?

Privacy: what should be shared, when and through what secure method?

Scope: is this one matter, a transaction, a dispute or ongoing advice?

Team: who performs the work, communicates and approves scope changes?

Deliverables: what is included, excluded and dependent on others?

Engagement: how are conflicts, confidentiality, fees and ending explained?

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BUSINESS ATTORNEY INTAKE / 05

COMPARE ENGAGEMENT PROPOSALS

Use Attorneys A and B with the same neutral brief. Clarify differences before sharing confidential material.

Attorneys A / B / proposal or engagement-letter versions

Matter routing, private-intake process and secure handoffs - A / B

Scope, deliverables, staffing, communications and client duties - A / B

Exclusions, complete fees, changes, ending terms and open questions - A / B

READY TO HEAR FROM PROS?

Create an account on PickYourPro.ai only if you choose, then start a Business Attorney request. Share only a non-sensitive Business A, Matter A and engagement-scope brief so participating pros can compete with proposals. Compare written scope, staffing, communications, complete fees, exclusions and fit. A private conflicts check and secure attorney consultation may be needed before confidential details are shared or representation begins.

One request. Every pro's best offer.

Start a request

Participation varies. A planning conversation may be needed before a final proposal.

Planning guide: https://www.pickyourpro.ai/services/attorney-business

U.S. Small Business Administration - Launch Your Business (official reference)

U.S. Small Business Administration - Manage Your Business (official reference)

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