



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: _____

NOTE: This material is intended as only an example which you may use in developing your own form. It is not considered legal advice and as always, you will need to do your own research to make your own conclusions with regard to the laws and ethical opinions of your jurisdiction. In no event will ALPS be liable for any direct, indirect, or consequential damages resulting from the use of this material.