



This resource is meant as a guide and is not a complete list.

<p style="text-align: center;"><u>Litigation</u></p> <p>Insured(s) Plaintiff(s) Defendant(s) Insurer Guardian ad litem Spouse Expert Witness(es) Lay Witness(es) Co-Counsel Opposing Counsel</p>	<p style="text-align: center;"><u>Corporate/Business/Real Estate</u></p> <p>Client Owner/spouse Partner(s) Shareholder(s) Director(s)/Officer(s) Subsidiaries/Affiliates Key Employees Buyer(s) Seller(s) Broker(s)/Lender(s)/Title Insurer Property Address Any opposing party in a transaction</p>
<p style="text-align: center;"><u>Probate</u></p> <p>Deceased Personal Representative Spouse/Children/Heirs/Devises Trustee/Guardian/Conservator</p>	<p style="text-align: center;"><u>Estate Planning</u></p> <p>Testator Spouse/Children/Heirs/Devises Personal Representatives Trustee/Guardian</p>
<p style="text-align: center;"><u>Criminal</u></p> <p>Client Codefendants(s) Witness(es) Victim(s)</p>	<p style="text-align: center;"><u>Bankruptcy</u></p> <p>Client Spouse Creditors Client's partners, family members & other businesses</p>
<p style="text-align: center;"><u>Your Firm</u></p> <p>All Lawyers Spouses/Parents/Sibling/In-laws All Employees to include contract attorneys and temporary staff Name of any business in which a firm member has an ownership interest or serves as an officer or director Key vendors and service providers</p>	<p style="text-align: center;"><u>Family/Dissolution</u></p> <p>Client Spouse Children Grandparents Expert witnesses Witnesses Adverse family members Guardian ad litem</p>
<p style="text-align: center;"><u>Workers' Compensation</u></p> <p>Injured Worker Employer Insurer</p>	<p style="text-align: center;"><u>Other</u></p> <p>Declined Clients and Adverse Parties, if known Prospective Clients</p>

NOTE: When listing any individual, be sure to include all known names (e.g. aliases, former, or maiden names).

**Based upon materials originally developed by The Professional Liability Fund of Oregon.*

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.