Instructions: Please complete this form as much as possible in Word format and return it to me. You may type an unlimited amount in each text box. You may also submit attachments. If you are not done in one month, I will check in with you and offer to get more actively involved to help you. This may increase the cost of your starter case.

# Names

## Client

Client’s name and email address. If there are multiple inventors, I don’t need all their names yet.

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## Invention

Do you have a working name for this invention?

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# History of the invention

## Past Applications

Have you applied for any patents with this invention in the past?  If so, please provide dates and application numbers if possible.

(Examples: “Provisional US application # 201863256, filed 8/15/19” or “Korean patent KR 5,539,042, filed 3/04/18, followed up by PCT application 10394874 filed 2/26/19”).

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## Publication

Has your product been “publicly disclosed?”  (Sold, licensed, offered, described in a trade journal or blog, discussed at trade shows, etc)  If so, explain what and when.

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# Inventor Status

If the inventor(s) will own all patent rights, please answer these questions.

## Gross Income

What was the inventor’s gross annual income on the last full tax return? (If there are multiple inventors, please only submit the highest value). This information is used for purposes of calculating USPTO fees. They ask for the gross income, not the adjusted gross income.

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## Number of Applications

Has any inventor filed four or more patent applications before this one? (Yes or no)

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# Assignee

## Existence

Is any inventor required (by contract or terms of employment) to hand over ownership of this patent to another person or corporation, for example an employer?

* No. “I plan to keep all rights individually.”
* Maybe. “But I am not required to.” This will usually be the case if you manage a single-member or family corporation or LLC.
* Yes. “I am contractually required to assign this invention.” This will usually be the case for an employment relationship.

Your answer:

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If you answered “Maybe” or “Yes,” please provide more information about the assignee below.

## Employees

How many employees does the assignee have?

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## Gross Income

What was the assignee’s gross annual income on the last full tax return?

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## Past Applications

Has the assignee filed four or more patent applications in the past? (Yes or no)

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# Detailed Disclosure

Now it’s time to “disclose” or describe your invention.  This will be the biggest part of the patent application process for you (and it’s usually a bigger task than the inventor thought it would be). It is important for you to be complete and accurate. Don’t be afraid to use any resources at your disposal. My clients have used drawings, written descriptions, prototypes, pictures, websites, videos, and personal demonstrations. If your invention is complex and / or I haven’t seen it, we might have to arrange at least one personal meeting to go beyond this form.

## A. Purpose

Summarize in a few sentences fundamentally what the invention is or what it does.  You can be broad here.

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## B. Conception

Please describe the “genesis moment” that made you think of this invention. (Ex: I was mopping the floor where someone had broken a glass. When I went to wring the mop, the glass cut my hand. I thought, “There has to be a cleaner, safer way to wring a mop!” I thought of the towel-on-a-loop concept and decided I could apply that to the mop cloths.)

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## Prior Art

Explain similar products in the field and how yours is different and / or better. The value of your invention lies in how it differs from existing products or industry standards, so you must educate me about that prior art. Remember that I am not an expert in your field. You might need to explain background facts that are “obvious” to you. The inventor’s knee-jerk statement, “There’s never been anything like it before,” is not helpful to me!!

(Write here, attach exhibits, and / or schedule a consultation to discuss in depth)

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## Details

OK, here we go!  Describe in full detail the parts or components of the invention and how they are combined. This can take several pages. Include diagrams, drawings, screen shots, etc., as required and be as specific as possible.  In your drawings, feel free to point to specific parts and / or provide your preferred names for them.  Please note that if you cannot think of anything to add for part (D) that you didn’t already mention in (A), then you might only have an “abstract idea,” which is not patentable.

Your target audience is “the ordinary designer” in your field. This is not for promotional purposes. You can be technical. Don’t try to be legalistic; I’ll take care of that later.

(Write free-form below, attach exhibits, and / or schedule )

## Prototype

Have you actually made a working prototype of this invention? If not, you are done with this form. If so, please continue.

### Special challenges.

What special challenges did you encounter while making the product and getting it to work efficiently? (Ex: It was really hard to figure out exactly how long Part A should be. When it was too short, it was too inflexible, but when it was too long it didn’t fit well with Part B. So we had to figure out just the right length and how to angle Parts A and B around each other.)

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### Surprising results.

Are there any features of this invention that produce surprising or unexpected results that wouldn’t be evident by looking at it? (Ex: By perforating the blender blades with small holes, we found that it helped not just by chopping vegetables finer but by making the blades much lighter, which enabled them to spin more rapidly).

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### Best modes

If applicable, describe any “best modes” or most effective ways to carry out your invention (e.g. its primary intended purpose, optimum materials, proportions, conditions, parameters, etc.) (Ex: We find that the blade retains sharpness best when it is made of an alloy of 72 – 80% iron and 5 – 10% carbon, and that it is most durable when one unitary piece is enclosed in a soft plastic handle).

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