# Conflicts of Interest Search Form (Privileged and Confidential)

The following must be completed by the potential client, attorneys and staff:

1. Obtain all the information on the potential client:

Name Other names Nicknames Address Spouse’s name Spouse’s other names Spouse’s nicknames Address (if different) Opposing parties’ names Associated persons or entities

*Potential client stops here and Preliminary Conflict Check performed. If no conflict is found, potential client completes*

§ *2 and then attorneys and staff complete the remainder.*

1. Determine which area of law is involved and write in the names, nicknames or other names of the associated persons/ entities involved:

## If litigation matter, who is the:

Insured Plaintiff(s) Defendant(s) Insurer Tutor/minor Expert witness(es) Other attorneys involved

## If divorce matter, who is the:

Client Spouse Child(ren) What is/are the age/ages of the child(ren)? Other attorneys involved

# Continued

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## If corporate/business/real estate matter, who is the:

Owner(s)/spouse(s) Buyer(s) Partner(s) Seller(s) Officer(s) Directors Shareholder(s) Subsidiaries/affiliates Key employees Property address(es) Any opposing party in a transaction Other attorneys involved

## If probate matter, who is the:

Deceased Spouse/child(ren)/heir(s)/legatee(s) Succession representative Attorney for succession representative Other attorneys involved

## If worker’s compensation matter, who is the:

Injured worker Employer Insurer Other attorneys involved

## If estate planning matter, who is the:

Testator/testatrix Spouse/child(ren)/heir(s)/legatee(s) Trustee Other attorneys involved

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## If criminal matter, who is the:

Accused Victim(s) Witness(es) Co-Defendant(s) Other attorneys/prosecutors involved

## If bankruptcy matter, who is the:

Client Creditor(s) Spouse Other attorneys involved

## Results of Search

Conflict System Search done by: Title Relationship to firm

## Instructions:

Duplicate of this form and attached Conflicts Search Results Memo routed to and signed by all attorneys and staff. No conflict found; entered as new client into conflict system and engagement letter sent by Conflict found, analyzed, and client accepted (explain reasons)

Engagement and Informed Consent letters sent by Conflict found, client not accepted, non-engagement letter sent by

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