



THE NATION'S LARGEST DIRECT WRITER OF  
LAWYERS' MALPRACTICE INSURANCE

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### Sample New Client/Matter Memo

Date: \_\_\_\_\_

New Client \_\_\_ New Matter \_\_\_

Client Name: \_\_\_\_\_

Client Affiliates:

\_\_\_\_\_  
\_\_\_\_\_

Matter: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Adverse Party and Affiliates:

Opposing Counsel:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Responsible Attorney: \_\_\_\_\_

Office sign off – Attorneys

Staff

(Initials)

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

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 conflict in regard 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: \_\_\_\_\_