

**INNOVATION ADVANCEMENT LEGAL CLINIC**

**PROSPECTIVE CLIENT QUESTIONNAIRE**

|  |  |  |  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **CLIENT CONTACT INFORMATION** | | | | | | | | | | | | |
| ARE YOU A/AN: | | | | | Individual(s) | | | | | Already Formed Business Entity (e.g. LLC, Corporation, etc.) | | |
| NAME OF APPLICANT(S):  (First, middle initial, last or Business Name): | | | | | | | | | | Lisa A Schaefer, RoleModel Enterprises, LLC | | |
| Mailing Address: | | | | 4237 E. Hazelwood, Phoenix, AZ 85018 | | | | | | | | |
| Web Address: | | http://CrowdPublish.TV | | | | | | | | | | |
| E-Mail Address: | | | Lisa@CrowdPublish.TV | | | | | | | | | |
| Work Phone Number: | | | | | 602-888-3089 | | | | | May we say who is calling?  YES  NO | | |
| Home Phone Number: | | | | |  | | | | | May we say who is calling?  YES  NO | | |
| Cell Phone Number: | | | | | 602-888-3089 | | | | | | | |
| Preferred Phone Contact:  Work  Home  Cell | | | | | | | | | | | | |
| Person to request when calling: | | | | | | | Lisa | | | | | |
| What name are you using for the business (if different from name given above)? | | | | | | | | | | | RoleModel Enterprises, CrowdPublish.TV | |
| If the applicant is an individual, are others involved in the business? *or* If the applicant is a business, who are the | | | | | | | | | | | | |
| owners? | Lisa Schaefer | | | | | | | | | | | |
| **OTHER CONSULTANT/ATTORNEY INFORMATION** | | | | | | | | | | | | |
| Have you worked with IALC or other ASU programs in the past? | | | | | | | | | | | | No  Yes I think so |
| If yes, which program(s)? | | | | | | Don’t remember what it’s called | | | | | | |
| Are you currently working with a consultant? | | | | | | | | | No  Yes | | | |
| If yes, name(s) of consultant(s): | | | | | | |  | | | | | |
| Phone no. of consultant: | | | | | | |  | | | | | |
| Email of consultant: | | | | | | |  | | | | | |
| Are you currently working with a law firm? | | | | | | | | | No  Yes | | | |
| If yes, name(s) of law firm(s): | | | | | |  | | | | | | |
| Phone no.(s) of law firm(s): | | | | | |  | | | | | | |
| Email(s) of law firm(s): | | | | | |  | | | | | | |
| **Statistical Information** (optional, requested solely for funding and reporting purposes) | | | | | | | | | | | | |
| RACE OF OWNERS (check all that apply) | | | | | | | | | | | | |
| Caucasian  Native American  Asian/Pacific Islander  Hispanic  Black  Middle Eastern  Other: | | | | | | | | | | | | |
| SEXES OF OWNERS (check all that apply) | | | | | | | | | Male  Female | | | |
| AGES OF OWNERS (check all that apply) | | | | | | | | 18-25  30-40  40-55  55+ | | | | |

**AVAILABILITY FOR COMMUNICATION WITH STUDENTS:** (check all that apply)

When are you available to meet in person and/or for formal meetings with students?

Weekdays 8am-lunch  Weekdays only during lunch break  Weekdays lunch – 5pm

When are you available to meet view phone/web and/or for informal discussions with students?

Weekdays 8am – lunch  Weekdays only during lunch break  Weekdays lunch – 5pm

Weekday evenings  Weekends

**INFORMATION REQUEST**

1. How did you hear about our program?

   Venture Devils  

2. Briefly describe why you wanted to start this business:

  I want it for myself, and it’s very scalable, so it should be available for others. I am an engineer & need to be out there as an example for other women to be tech leaders, not followers.  

3. Briefly describe the problem solved by your idea/technology/business:

 CrowdFunding for authors & filmmakers    

4. Briefly describe your solution to this problem, including how your solution differs from other solutions currently available:

 Partnered organizations get portion of proceeds in exchange for marketing to their membership. Projects are broken into phases/chapters so authors/filmmakers can build buzz & earn money throughout their project rather than one shot per book or movie

5. What other solutions are available and who/what business offers these solutions?

  Kickstarter, gofundme, Indiegogo, kindle direct publishing, Patreon – none of them have partnered organizations   

6. What is your overall goal in working with the Innovation Advancement Legal Clinic?

 Make sure I don’t do anything to encourage a law suit - terms of service, taxes, Agreements with volunteers, etc. 

7. The following is a list of common legal services provided by the Innovation Advancement Legal Clinic. Please indicate numerically in order of important, with 1 being the most important, the specific service(s)/work product(s) that you are seeking from us:

|  |  |
| --- | --- |
|  | Business Entity Formation |
| 3 | NDA/CA/MTA Creation |
| 3 | Intellectual Property Audits |
| 3 | Licensing Agreements and IP Assignments |
| 3 | Trademark/Copyright Consulting |
| 2 | Employment Agreements focused on IP Protection |
| 1 | Contract Drafting – terms of service. I already have a draft. |
|  | Patent Search |

If the service(s)/work product(s) you are seeking is not listed above please briefly describe:

  I’m sure I’ll have more questions. There might be tax implications in the wording on my web platform.   

8. Please discuss the timeline for the development of your business, including what you have already accomplished as well as your plans for the future:

  Get people to sign up as fast as I can get them to   

9. What is the target market/customer for your product or service?

 Indie authors & filmmakers    

10. Describe what you believe is the growth potential for your company:

  All book authors & indie filmmakers should use CrowdPublish.TV   

11. How do you plan to spread the work about/market your business?

  Facebook, twitter, goodreads, networking, friends   

12. What do you consider your strengths and weaknesses as a businessperson or your ownership team’s strengths and weaknesses?

 Strengths: I am brilliant. I have better judgment than 99.9999% of the population. I can write my own software. Weakness: I am the only person. Need more marketing. 

13. How do you plan to finance your business in the future? (Check all that apply)

Other income  savings  Loans  Line of credit

Family  Friends  Private grants  Government assistance

Stock dividends  Trust disbursements  Donations

Other  I have extensive investments. Grants & govt assistance would be great, but haven’t found anything promising at this time.    

Please briefly describe what steps you have taken in furtherance of your goal to start a business?

Developed a business plan

Secured funding

Filed organizational documents

Received a tax identification number

Received other professional services from accountants, other lawyers, etc.

Other (specify):   SCORE   

15. Have you developed a budget for your first year and beyond?  No  Yes (please be prepared to provide copies)

16. What sources of funding are currently available to you? (Check all that apply)

Savings  Loans Line of Credit  Family  Friends  Private Grants Govt assistance

ASU Awards:  EDSON  Innovation Challenge  Other ASU (explain)      

Other (explain):   personal investments   

17. If you are not accepted as a client of the Innovation Advancement Legal Clinic, can you afford to hire local professionals to assist with the services you’re seeking?  Yes  No Why do you need this answer

18. What is your preferred exit strategy and why?

IPO

Merger/Acquisition

None, I want to o perate my business myself for the foreseeable future

I don’t know

Please explain why this is your preferred exit strategy:

 This is my brainchild. I know what it needs to be. Nobody else can be me.   

19. Please explain any circumstances in which you and your co-owners do not see “eye to eye” with respect to your venture.

  N/A   

20. Please explan any and all disputes, if any, you have recently had or currently have with your co-owners and non-owner service provided with respect to your venture.

   N/A  

Please attach any additional information with would help the intake committee and/or students assigned to work with you to understand your business/technology idea better. http://CrowdPublish.TV

Please submit application to Karen Furgeson at [karen.furgeson@asu.edu](mailto:karen.furgeson@asu.edu). You may also call her at 480-965-6523 if you have any questions.

***Please note: The IAP Legal Clinic relies on all affirmative representations provided in this intake form by you. As such, by completing and providing this form to the IAP Legal Clinic, you represent and warrant that all information provided by you in this intake form is true and accurate, to the best of your knowledge.***