New Client Checklist

Date:

Client Name: __________________

Please confirm if you have done the following:

- Affiliated with ASCAP or BMI
  - Yes
  - No

- Affiliated with a PRO other than ASCAP or BMI
  - Yes
  - No

- Established a publishing company for each writer
  - Yes
  - No

- Registered your songs with ASCAP or BMI (or other PRO)
  - Yes
  - No

- Affiliated with or become a member of SoundExchange
  - Yes
  - No

- Performed a trademark search for your professional name
  - Yes
  - No

- Registered a trademark for your professional name in the US
  - Yes
  - No

- Registered a trademark for your professional name in any other country
  - Yes
  - No

- Digital distribution aggregator?
  - Yes
  - No

Unusual terms: ________________________________

- Formed a company ("loan out") for your activities in music?
  - Yes
  - No

- Minted NFT?
  - Yes
  - No
Licensed for film/TV/games
If yes, which ones: ________________________________

Signed a recording contract

Signed a producer contract

Signed a publishing contract

Signed a merchandising agreement

Signed a musical instrument endorsement agreement

Signed a management agreement?
Describe: ________________________________

Signed a business management agreement?
Describe: ________________________________

Engage an accountant?
List: ________________________________

Signed any other significant agreement in connection with your professional artist career not mentioned above?
List: ________________________________

Opened a bank account as an artist or band?
List banks and name(s) of authorized signers
_____________________________________________

Obtained insurance?
List: ________________________________
Please provide the following information:

- Website domain name: ________________________________

- Who is the registrant for the domain name:
  ________________________________

- When does your domain name expire? _____________________

- Who is the webhosting company for your website?
  ________________________________

- Who designed your website?
  List: ________________________________

- Was the web developer hired under a written contract?  
  Yes  No

- Social media accounts:

- Who holds the passwords to your website and social media?
<table>
<thead>
<tr>
<th>Professional Name (by member)</th>
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<tr>
<td>Legal Name (by member)</td>
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<td>Instrument</td>
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<td>Social Security/Tax ID</td>
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<td>ASCAP/BMI/SESAC</td>
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<td>SoundExchange Artist Member? (yes/no)</td>
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<td>Union (AFM/SAG-AFTRA)</td>
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<td>Passport? (yes/no)</td>
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<tr>
<td>Publishing Company Name/PRO Affiliation</td>
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