



PARTNER QUESTIONNAIRE

Full Name: _____
 Home Address: _____
 Preferred Phone: _____
 Personal E-mail: _____
 Current Firm's Fiscal Year End: _____
 Recruiting Firm/Recruiter: VortexLegal

PART I: ECONOMIC DATA

A. Billings/Collections

	Current Year to Date	2022	2021	2020
Collections for your Personal Time (working attorney receipts)¹				
Client/Originating Attorney Collections²				

B. Hours Billed and Average Hourly Rates

	Current Year to Date	2022	2021	2020
Client Billable Hours (only personal time included)				
Standard Hourly Rate				

C. Compensation

	Anticipated for Current Year	2022	2021	2020
BASE Compensation				
BONUS Compensation				
TOTAL Compensation				
Compensation Basis: (W2 or K1)				

¹ To include all revenue received based upon your own personal time worked by year regardless of who originated.

² To include all revenue received by all timekeepers (including you) on matters for which you are the primary relationship/billing attorney.

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PART II: BUSINESS & PRELIMINARY CONFLICTS INFORMATION

A. Information for Key Clients

Name of Client	Years Represented	Service Provided <i>(Litigation, M&A, Corporate)</i>	Adverse Party(s)	Likelihood to transfer to new firm	Collections YTD	Collections 2022	Collections 2021	Collections 2020
1.								
2.								
3.								
4.								
5.								
6.								
7.								
8.								
9.								
10.								

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B. Collections

Anticipated collections for the next 12 months for all clients in total if you move to the new firm:

Low: \$ _____

Mid: \$ _____

High: \$ _____

If your total anticipated collections vary significantly from total historical collections, please explain why:

Do any of the clients listed above have a fixed fee or alternative payment arrangement? If yes, which ones?

C. Staffing

Are there any professionals who are crucial to your practice? Please provide the following information regarding the timekeepers who support you and the clients you serve.

Name	Title	Annualized Billable Hours	Hourly Rate	Current Compensation

D. Due Diligence Questions

	YES	NO
1. Do you serve on any board(s) in which you function in the capacity of an attorney?		
2. Do you presently serve on any board(s) for which you receive compensation?		
3. Do you have existing client trust funds?		
4. Do you presently have any investments in the business of any of your clients?		
5. Have you ever been involved in a professional disciplinary proceeding?		
6. Have you ever been sanctioned or had your professional licenses suspended or revoked?		
7. Has anyone ever made a claim against you for professional negligence or any other claim? If yes, was it reported to an insurance carrier and approximately what was the date? If a lawsuit was filed, please identify the parties and result.		