FICTIONAL SAMPLE. Every person, company, and detail on this page is invented for demonstration. Not a real caller, client, or firm.

RETAINR INTAKE BRIEF

URGENT: DEADLINE IN 7 DAYS

Bluefin Craft Labs LLC — co-founder dispute

NEW CLIENT

Prepared for: Sample Law PLLC (fictional) · Brief ID RTN-SAMPLE-0001

CONFLICT CHECK PENDING

Received Mon, Oct 26, 2026, 9:14 AM ET
Duration 8 min 37 sec · English · Phone

CALLER AND COMPANY

Caller	Jordan Alvarez (fictional)
Role	Co-founder, member and manager
Phone	(555) 010-0142 · confirmed
Email	jordan@bluefin.example
Preferred contact	Text first, then call; weekday mornings
Company	Bluefin Craft Labs LLC
DBA	Bluefin Brewing Supply
Entity / state	Member-managed LLC · Ohio
Industry / size	Brewing equipment retail · 14 employees
Client status	New client (no prior matters stated)
Referral source	Dana Whitfield, CPA (fictional)

MATTER

Matter type	Business dispute · LLC member / co-founder dispute
Summary (caller's words, kept short)	Co-founder removed the caller's access to the company bank account and has called a member meeting to vote on removing the caller as manager.
Goal stated	Understand options before the meeting; protect ownership stake
Detail policy	Facts limited to 2 sentences until conflicts clear

PARTIES FOR CONFLICT CHECK

NAME	RELATIONSHIP	SIDE	CONFLICT STATUS
Bluefin Craft Labs LLC (DBA Bluefin Brewing Supply)	Prospective client entity	Client	Pending firm check
Jordan Alvarez	Caller; member, 50%	Client	Pending firm check
Casey Morgan	Co-founder; member, 40%	Adverse	Pending firm check
Northgate Angel Partners LP	Investor member, about 10% (caller unsure)	Related	Pending firm check
Harborline Labs LLC	New company recently formed by Casey Morgan	Adverse (possible)	Pending firm check
First Lakeshore Bank	Company's bank; holds the account in question	Third party	Pending firm check
Reed & Wong LLP	Possibly Casey Morgan's counsel (unconfirmed)	Opposing counsel	Pending firm check
Dana Whitfield, CPA	Referral source; company's outside accountant	Referrer	Pending firm check

Parent / subsidiaries: none stated. Officers or directors beyond the two members: none. Status column is a placeholder: the firm runs these names through its own conflict system.

URGENCY AND DEADLINES

Served with a lawsuit?	No
Key deadline	Member meeting called for Mon, Nov 2, 2026 (7 days)
Other dates	Bank access removed Oct 23, 2026
Urgency	**Urgent**: deadline within 7 days triggered escalation

DOCUMENTS MENTIONED

- Operating agreement (signed 2023)
- Possible amendment adding the investor (caller unsure if signed)
- Email from Casey Morgan calling the meeting
- Recent bank statements

Nothing collected on the call. Secure upload link is sent only after conflicts clear.

BUDGET AND FEE EXPECTATIONS

Billing preference	Open to hourly; asked whether a flat fee for agreement review is possible
Budget range stated	$5,000–$10,000 to start
Fees quoted on call	None (Retainr never quotes fees)

CONSULT BOOKED

Time	Tue, Oct 27, 2026, 10:00–10:30 AM ET
With	Next available business attorney (per firm rules)
Format	Video call; link sent by email
Confirmation	Email sent; text sent (opted in)

AI CONFIDENCE AND ESCALATION

Overall capture confidence	High (92%)
Low-confidence fields	Investor's ownership %; whether the amendment was signed
Escalation	Warm transfer at 3:42 to a Retainr intake agent (deadline within 7 days)
Agent notes	Confirmed the meeting date and that no court papers were served. Caller calm; no advice requested or given.

RECOMMENDED NEXT STEP

1. Run the 8 names above through the firm's conflict system today.
2. If clear: send the secure upload link for the operating agreement and meeting email.
3. Attorney reviews documents before the Oct 27 consult; the Nov 2 meeting is the working deadline.
4. If a conflict appears: cancel the consult and notify the caller without taking more details.

RECORDING AND TRANSCRIPT

Recording link (placeholder) Full transcript (placeholder)

Stored 90 days by default; access limited to the firm and Retainr QA.

CONSENT CAPTURED

- ✓ AI disclosure given at 0:00
- ✓ Recording notice given at 0:00
- ✓ Transactional text opt-in: yes
- – Marketing text opt-in: no
- ✓ Told no attorney-client relationship exists until the firm confirms in writing

Retainr is not a law firm and gave no legal advice on this call. This brief is confidential to the receiving firm. Fictional sample for demonstration.