

CLIENT INTAKE FORM

Disclaimer: Thank you for your interest in being a client of _____ . This form is used to collect information about new clients and is for internal purposes only. The information you provide is confidential and will be treated accordingly.

PERSONAL INFO

Name: _____

Date of Birth: _____ Social Security Number: _____

Marital Status: Single Married Divorced Widow

Address: _____

City: _____ State: _____ Zip Code: _____

Do you have any children? Yes No

-If yes, how many are currently under 18 years of age? _____ How many live with you? _____

CONTACT DETAILS

Phone: _____ Phone 2: _____

-Is it ok to leave voicemails? Yes No

E-Mail: _____ Fax: _____

MILITARY HISTORY

Have you ever been in the military? Yes No

Service Number: _____ Type of Discharge: _____

Branch: _____ Dates of Service: _____

EMPLOYMENT

Employer's Name: _____ Occupation: _____

Annual Pay: \$ _____ Start Date: _____

Education: High School Bachelor's Master's Other: _____

Have you ever filed for bankruptcy? Yes No

-If yes, when? _____

LEGAL QUESTIONNAIRE

Briefly describe your legal issue:

Have you ever been represented by another firm for this issue? Yes No

-If yes, which firm(s)? _____

Have you ever been convicted of, or charged with, a criminal offense? Yes No

-If yes, describe: _____

How did you hear about our law firm? _____

ACKNOWLEDGMENT

The purpose of this initial consultation is to determine if our firm can assist you with your legal needs, to inform you about the services our firm provides, and to discuss the potential agreement for the provision of legal services and the formation of an attorney-client relationship. This initial consultation does not create an attorney-client relationship and does not mean our law firm will act as your legal counsel.

After the initial consultation, if your case or matter is accepted, we will provide you with a written agreement (or engagement agreement) which will set forth the terms and conditions for our legal services. Upon receipt of a signed agreement by you, and the required retainer amount, the attorney-client relationship will commence.

Your legal rights may be affected by laws that place time restrictions on certain legal claims or may be otherwise affected if prompt action is not taken. If our law firm does not accept your case or matter, or you decide not to retain our services, you should seek alternate legal counsel immediately to ensure that your legal rights are not affected.

IN WITNESS WHEREOF, I hereby acknowledge that I have read the foregoing notice and understand that this law firm will not act as my recognized legal counsel, or take any action on my behalf, unless a written agreement has been signed and the retainer amount is paid in full. All information entered on this intake form is accurate to the best of my knowledge. I understand that in the event of any inaccuracies, any retainer amount paid is subject to forfeiture.

Signature: _____ Date: _____