



CLIENT INTAKE FORM

The purpose of an initial consultation is for the attorney to advise you, the prospective client, what, if anything, may be done for you and what the minimum fee will be. The purpose is not to render a definitive legal opinion, as it may be impossible to fully assess a matter within the time frame allotted for a consultation or with the information you may initially provide.

One of three outcomes is possible following your consultation.

1. You and the attorney mutually agree to the terms of representation. A separate document called an *Agreement for Representation* will be provided to you.
2. The attorney declines representation, or
3. You decide not to use the services of the attorney.

The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name:	_____	_____	_____	_____
	<i>Last</i>	<i>First</i>	<i>Middle</i>	<i>Maiden</i>
Date:	_____			
Address:	_____		Cell Phone:	_____
	_____		Home Phone:	_____
	_____		Office Phone:	_____

Marital Status:

Married

Divorced

Widowed

Single

Separated

Drivers License # _____

Social Security # _____

Are you known by any other names? (A fictitious name, a nickname, a former name, your maiden name etc.)

Yes

No

If yes, what are they?

1. _____

2. _____

Where are you employed? _____

May we contact you there?

Yes

No

If your mail is returned as undeliverable or telephone service terminated, please provide the name of someone (friend or relative) that you believe will always know how to contact you.

Name:

Last

First

Middle

Maiden

Relationship: _____

Address: _____

Phone: _____

Briefly explain what you need advice about or assistance with today:

Please classify your urgency in concluding this matter by checking a box below:

- Critical* – Personal safety or continuation of business depends on it.
- Urgent* – severe hardship, personal or financial inconvenience if matter is not resolved quickly.
- Very important* – Matter interferes with business or personal financial stability.
- Important* - It needs to be taken care of, but no immediate hardship will result in the interim.
- I wanted to see if the matter was worth pursuing.
- I just wanted to know what my rights are.

Are there any other parties involved? (Examples: a friend, an employer, a neighbor, signer of a contract, etc. This should include parties on either side of your issue.)

Party: _____	Relationship: _____
Party: _____	Relationship: _____
Party: _____	Relationship: _____

On the lines below, list the documents (papers) that you think may help us to understand the issues. With your permission, these documents may be photocopied and your originals returned to you at the conclusion of the initial consultation.

1. _____
2. _____
3. _____

If things turned out precisely the way you want, what would the outcome be?

Knowing that there are no guarantees, what can you accept?

Are we the first attorneys you have consulted regarding this matter?

 Yes No

If no, why didn't you hire their services?

Have you ever been represented by an attorney before?

 Yes No

If yes, please state the circumstances:

How did you learn of our practice?

 A friend *Yellow Pages* *Referral from Bar or other organization* *Our web page (www.apollaw.com)* *Former Client* *Other*

How will you pay for your attorney's fees in this matter?

 Check today *Cash today* *Contingency Fee* *Credit card (number:)*

Exp. Date:

PLEASE READ CAREFULLY and sign below:

Following your initial interview, if you agree to hire the Attorney and the Attorney agrees to represent you, you will both sign an Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation.

If the Attorney *is* willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with the Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

NOTICE: This office does not represent you with regard to the matters set forth by you herein in this information sheet or discussed during your consultation unless and until, both you and the Attorney execute a written Agreement for Representation.

If the Attorney does *not* agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, nor any other matters you may discuss with the Attorney during your consultation.

If your legal problem(s) involve a potential lawsuit, it is important that you realize a lawsuit must be filed within a certain period of time called a *Statute of Limitations*. Therefore, the Attorney strongly urges you to immediately consult with another attorney to protect your rights. The Attorney's decision not to represent you should not be taken by you as an expression regarding the merits of your case.

Your signature acknowledges only that you received a copy of this completed information sheet and does not mean you have hired the Attorney.

SIGNATURE _____

DATE ____/____/____

This portion to be completed by the Attorney:

- Will Represent (see New Case Memo and Agreement for Representation attached)*
- Will investigate and report (schedule a follow-up conference)*
- Representation declined - Letter of declination will be sent*

- Party "will think about it" and back with us – No action to be taken and party was so informed.*
- Client declined representation*

Interviewed by _____ this _____ day of _____

NOTES:
