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### 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 or documents) that you may be able to provide at the initial consultation. One of three outcomes is possible following your consultation:

- A. You and the Attorney mutually agree to the terms of representation, (to be memorialized in a separate document called a Retainer Agreement; a signed copy will be provided to you) or,
- B. The Attorney declines representation, or
- C. You decide not to use the services of the Attorney.

**Note:** The following questions will help us understand your reason(s) for seeking legal services. Your **responses are protected by the attorney-client privilege** and will be held in strict confidence.

Full Name (including middle names): \_\_\_\_\_

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ (H) \_\_\_\_\_ Ext. \_\_\_\_\_ (W)

Mobile: \_\_\_\_\_

E-Mail: \_\_\_\_\_

Social media accounts & websites (include usernames): \_\_\_\_\_

Occupation: \_\_\_\_\_ Yearly Income: \_\_\_\_\_

Adverse Party & Address: \_\_\_\_\_

**Legal Matter(s) (check all that apply)**

**Administrative Law**

☐ Government Benefits

☐ Licensing

**Antitrust Litigation**

☐ Antitrust & Trade Litigation

**Bankruptcy**

☐ Bankruptcy Law

☐ Credit Repair

**Business/Corporate**

☐ Business Formation and Planning

☐ Litigation

☐ Business Organizations

☐ Partnership

☐ Contracts

☐ Sub-chapter S Corporations

☐ Limited Liability Companies

☐ Trade Secrets

**Construction Litigation**

☐ Construction Defects

**Consumer Law**

☐ Auto Dealer Fraud

☐ Identity Theft

☐ Consumer Protection

☐ Lemon Law

☐ Fraud

**Creditor Debtor Rights**

☐ Collections

☐ Foreclosure

☐ Debt Discharge

☐ Loan Modifications

**Employment Law**

☐ Class Action

☐ Non-payment of Wages & Overtime

☐ Constitutional Claims

☐ Other:

☐ Discrimination

☐ Public Employees

☐ DC Leave Laws

(check: DC MD VA)

☐ Employment Contracts

☐ Public Policy Torts

☐ ERISA & Employment Benefits

☐ Retaliation

☐ Federal Employees

☐ Security Clearances

☐ FMLA

☐ Sexual Harassment

☐ Labor Law

☐ Undocumented Workers Rights

☐ MD Leave Laws

☐ Unemployment Compensation

☐ MSPB Practice

☐ USERRA

☐ Non-Competes & Non-Solicitation  
Agreements

☐ Whistleblower & SOX

☐ Wrongful termination

**Estate Planning & Probate**

- |   |  |
|---|--|
| <input type="checkbox"/> Estate Planning                  | <input type="checkbox"/> Probate & Estate Administration |
| <input type="checkbox"/> Guardianships & Conservatorships | <input type="checkbox"/> Trusts                          |
| <input type="checkbox"/> Litigation                       | <input type="checkbox"/> Will Contests                   |
| <input type="checkbox"/> Living Wills                     | <input type="checkbox"/> Wills                           |
| <input type="checkbox"/> Power of Attorney                |  |

**General Litigation**

- |  |                                       |
|--|---------------------------------------|
| <input type="checkbox"/> Litigation        | <input type="checkbox"/> Small Claims |
| <input type="checkbox"/> Restraining Order |                                       |

**Insurance Coverage**

- |  |  |
|--|--|
| <input type="checkbox"/> Bad Faith Insurance | <input type="checkbox"/> Insurance Defense |
| <input type="checkbox"/> Insurance           |  |

**Nonprofit Organizations**

- ☐
- Non-profit & Tax-exempt Organizations

**Real Estate**

- |  |   |
|--|---|
| <input type="checkbox"/> Condominiums & Cooperatives | <input type="checkbox"/> Mortgage & Refinance |
| <input type="checkbox"/> Landlord/Tenant             | <input type="checkbox"/> Short Sale           |

**BRIEF DESCRIPTION OF LEGAL MATTER(S)**

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Deadlines/Time Pressures:

Please classify your urgency in concluding this matter? (check one)

- ☐ Critical – Personal safety or continuation of business depends on it.
- ☐ Very important – severe hardship (personal or financial) if matter is not resolved quickly.
- ☐ Important – Matter interferes with business or personal financial stability.
- ☐ Needs to be done, but no immediate hardship in the interim.
- ☐ Just thought I'd see if it was worth pursuing, but I'm not counting on anything.
- ☐ Just wanted to know what my rights are? I'll then let you know after I think about it.

Are we the first attorneys you have consulted regarding this matter? ☐ **Yes** ☐ **No**

If No – Why didn't you hire their services?

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Have you ever been represented by an attorney before in this matter? ☐ **Yes** ☐ **No**

If Yes – Please state the circumstances and include contact information for your former attorney.

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Marital Status

☐ Married

☐ Widowed

☐ Single

☐ Separated

☐ Divorced

Name of Spouse: \_\_\_\_\_

With whom do you live (names, relationship, and age of any children)? \_\_\_\_\_

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

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_ Phone No. (\_\_\_\_) \_\_\_\_\_

State & Zip \_\_\_\_\_

Client's Driver's License No. \_\_\_\_\_ Social Security No. \_\_\_\_\_

DOB: \_\_\_\_\_

Do you have a maiden name? ☒ **Yes** ☐ **No**

If yes, please provide: \_\_\_\_\_

Are you known by any other names? ☐ **Yes** ☐ **No**

If yes, what name(s): \_\_\_\_\_

Have you been involved in other civil matters? ☒ **Yes** ☐ **No**

If so please provide details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Have you been convicted of any crimes? ☐ **Yes** ☐ **No**

If so please provide details: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How did you learn of our office?

☐ A friend

☐ Internet Website

☐ Bar Referral

☐ Former Client

☐ Other:

**NOTE: If you are a business entity or prospective business entity, please also complete the *Client Intake Form Addendum – Business & Corporate*.**

**PLEASE READ CAREFULLY & SIGN BELOW**

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

If the Attorney is willing to represent you and you decide not to sign a Retainer Agreement, you are strongly urged to **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 Retainer Agreement.**

If the Attorney does not agree to represent you, it will include not representing you with regard to the matter set forth by you on this information sheet, and any other matters that you may have discussed with the Attorney during your initial consultation. If your legal problem(s) involve a potential legal claim, **it is important for you to realize that a legal claim 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 Client Intake Form and does not mean you have hired the Attorney.

SIGNATURE \_\_\_\_\_ DATE \_\_\_\_/\_\_\_\_/\_\_\_\_