



Client Intake Form

DATE ____/____/____

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 there for 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, or
(After a separate document called an Engagement Letter is signed a copy will be provided to you.)
- B. The Attorney declines representation, or
- C. You decide not to use the services of the Attorney.

Note: 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 _____
Last First Middle or Maiden

Address _____
Number Street City State Zip

Home Phone (____) _____

SSN: _____

Date of Birth: ____/____/____

Email: _____

Full Name of Employer against whom you would like to take legal Action

Name _____

Address of Corporate Headquarters of Employer Referenced Above

Address _____

_____ State & Zip _____

Name and Address of Human Resources Director for Employer Referenced Above

Name _____

Address _____

_____ State & Zip _____

Number of employees working for employer _____

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

When did the incident(s) occur: (Date) ____/____/____

On the lines below, list the documents (papers) that you think may help us to understand the issues.

1. _____
2. _____
3. _____

(NOTE: Any documents you supply that are important to your matter will be photocopied, with your permission, and your originals returned to you at the conclusion of the initial interview.)

Ideally, if things turn out precisely the way you want, what would you want the outcome to 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

Are you known by any other names? Yes No

If yes name(s) _____
(A fictitious name, a nickname, a former name, your maiden name etc.)

Where are you employed?

May we contact you there? Yes No Phone No. (____) _____

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 _____

How did you learn of our office A friend Yellow Pages Bar Referral
 Our Web Page www.theonealfirm.com Former Client Other

Are you in bankruptcy or do you plan on filing in the next 6 months? Yes No

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 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 ____/____/____