

# CLIENT INFORMATION—INTAKE

Referred by: \_\_\_\_\_

Date: \_\_\_\_\_

Name: \_\_\_\_\_  
Last First M.I.

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Email: \_\_\_\_\_

SSN: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ Date of Birth: \_\_\_\_\_  
MM/DD/YYYY

Driver's License #: \_\_\_\_\_

Best time to contact: Days \_\_\_\_\_ Hours \_\_\_\_\_

Employment: Position \_\_\_\_\_ Address \_\_\_\_\_ Salary/Wage \_\_\_\_\_

Legal matter client is calling about: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_ Add'l Notes Attached. \_\_\_ No Add'l Notes.

## ***For Office Use Only***

Non-Engagement Letter Sent:  Consult Only:

Account# \_\_\_\_\_ Matter: \_\_\_\_\_

File/Case# \_\_\_\_\_ Court: \_\_\_\_\_ Attorney: MKS \_\_\_\_\_

Opened Date: \_\_\_\_\_ File Date: \_\_\_\_\_

Court Case #: \_\_\_\_\_

Fee Arrangement: Percentage: \_\_\_\_\_ Hourly \$ \_\_\_\_\_ per hr. Flat \$ \_\_\_\_\_

Retainer Amount: \$ \_\_\_\_\_ Fee Agreement (signed and dated): \_\_\_\_\_ Engagement Letter Sent: \_\_\_\_\_

### **Notes/Instructions:**

Open File \_\_\_ Open Word Perfect File \_\_\_ Add to Case List \_\_\_

Post Representation Survey Sent:  Yes  No Date: \_\_\_\_\_

Bill to: \_\_\_\_\_ Client: \_\_\_\_\_