

# LAW OFFICE OF EDWARD G. SEITZ, P.L.

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## INITIAL CLIENT INTERVIEW FORM

### FAMILY LAW

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 for services will be. The purpose is not to render a definitive legal opinion because 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. Either

1. you and the attorney mutually agree to the terms of representation (after a separate document called an Agreement for Representation is signed a copy 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 understand the reason for your visit today. Your responses are protected by the attorney-client privilege and will be held in strict confidence even if you decide not to retain our services.

Name: \_\_\_\_\_  
last first middle or maiden

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address: \_\_\_\_\_  
number street city state zip

Home phone # \_\_\_\_\_ Cell # \_\_\_\_\_ Work phone # \_\_\_\_\_

Employer: \_\_\_\_\_ e-mail address: \_\_\_\_\_

Length of Employment: \_\_\_\_\_ Salary: \$ \_\_\_\_\_

Spouse: \_\_\_\_\_  
Last First Middle or maiden

Social Security Number: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Address \_\_\_\_\_  
number street city state zip

Home phone # \_\_\_\_\_ Work phone # \_\_\_\_\_

E-mail Address: \_\_\_\_\_ Employer: \_\_\_\_\_

Length of Employment: \_\_\_\_\_ Salary: \$ \_\_\_\_\_

Date and Place of Marriage: \_\_\_\_\_ Date of Separation? \_\_\_\_\_

Has Either Party been charge with Domestic Violence? If so who and when?

\_\_\_\_\_

Does either party have an injunction against them?

\_\_\_\_\_

Has there been a history of domestic violence during the marriage? If so, please explain? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**MUST BE COMPLETED THOROUGHLY**

**CHILDREN**

<u>Full Name</u>	<u>Present Residence</u>	<u>DOB</u>	<u>Social Security #</u>	<u>Place of Birth</u>
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1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

For each of the children above, list all addresses where the child has resided within the past six(6) years. Include the name of the person with whom the child has resided.

1. Child's name: \_\_\_\_\_

<u>Address</u>	<u>Dates</u>	<u>Custodian</u>
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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. Child's name: \_\_\_\_\_

<u>Address</u>	<u>Dates</u>	<u>Custodian</u>
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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. Child's name: \_\_\_\_\_

<u>Address</u>	<u>Dates</u>	<u>Custodian</u>
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4. Child's name: \_\_\_\_\_

<u>Address</u>	<u>Dates</u>	<u>Custodian</u>
_____	_____	_____
_____	_____	_____

**Real Property:**

Please list any real property owned by you and/or your spouse. Include the monthly payment, equity, and location.

<u>Location of Property</u>	<u>Value</u>	<u>Mortgage</u>	<u>Monthly Payment</u>	<u>Party Retaining Ownership</u>
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

**Vehicles/Mobile Homes/Boats:**

Please list the year, make, model, amount owed, and value of any vehicles, mobile homes, or boats that you and/or your spouse own.

<u>Year</u>	<u>Make/Model</u>	<u>Amount Owed</u>	<u>Value</u>	<u>Party Retaining Ownership</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Bank Accounts:**

<u>Name of Bank</u>	<u>Type of Account</u>	<u>Balance</u>	<u>Name(s) on Account</u>	<u>Party Retaining Account</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

**Insurance Policies:**

<u>Type</u>	<u>Company</u>	<u>Policy No.</u>	<u>Beneficiary</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Other Assets (Stocks, Bonds, Pensions, 401K, etc.):**

<u>Name on Account</u>	<u>Bank/Company</u>	<u>Account #</u>	<u>Balance</u>	<u>Party Retaining Ownership</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

List any and all property you brought into the marriage and owned prior to being married.

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**Liabilities:**

Please list all debts owed by you and/or your spouse.

<u>Name on Account</u>	<u>Bank/Store</u>	<u>Account #</u>	<u>Balance</u>	<u>Payment</u>	<u>Responsible Party</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Are there any pending lawsuits involving family members: \_\_\_\_\_ If yes, what type of lawsuit: \_\_\_\_\_

Treatment of Income

Tax/Refund: \_\_\_\_\_

Party to Claim Minor Children as

Dependents: \_\_\_\_\_

Would you like to have your maiden name restored after the dissolution is final?  If yes, what is your full maiden name you would like to have restored? \_\_\_\_\_

Please list any other information you feel would be helpful to the attorney during you consultation.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

If you and your spouse have reached an agreement for a resolution of this case, please state below what you have agreed upon. Include the following that may apply in your case: Distribution of property, payment of debts, division of assets, custody of children, child support, alimony, any other issue involved in your case.

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

How did you learn about our law firm? Outdoor Signs ( ) Bus Bench ( ) Billboard ( ) Other \_\_\_\_\_

Personal Referral \_\_\_\_\_ Television Commercial – Channel ( ) Radio Commercial – Station ( ) Bellsouth Real Yellow Pages ( ) Talking Phone Book

**DO NOT WRITE BELOW THIS LINE (FOR ATTORNEY USE)**

Client wants: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_

Additional Notes: \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_