

FILE NUMBER: \_\_\_\_\_

**CLIENT INTAKE SHEET**

DATE: \_\_\_\_\_

NEW CLIENT: [ ]

CURRENT OR PRIOR CLIENT: [ ]

CLIENT \_\_\_\_\_

SS#: \_\_\_\_\_ DOB \_\_\_\_\_ (needed to electronically file cases)

HOME ADDRESS: \_\_\_\_\_

HOME PHONE: \_\_\_\_\_ MOBILE PHONE: \_\_\_\_\_  
(circle preferred number)

EMAIL: \_\_\_\_\_

DO YOU REGULARLY CHECK THIS EMAIL ACCOUNT? \_\_\_\_\_ YES \_\_\_\_\_ NO

EMPLOYER \_\_\_\_\_

EMPLOYER ADDRESS: \_\_\_\_\_

OTHER PARTY: \_\_\_\_\_

OTHER PARTY'S ADDRESS: \_\_\_\_\_

EMERGENCY CONTACT: (NAME) (RELATIONSHIP) (TELEPHONE)

HOW DID YOU HEAR ABOUT US? (please check all that apply)

Friend/Family \_\_\_\_\_

Who referred us? \_\_\_\_\_

Facebook \_\_\_\_\_

Billboard \_\_\_\_\_

Website \_\_\_\_\_

Radio ad \_\_\_\_\_

Google \_\_\_\_\_

TV ad \_\_\_\_\_

*To be completed by attorney (PLEASE DO NOT WRITE BELOW THIS LINE)*

CONFLICT CHECK: \_\_\_\_\_ FEE CONTRACT: \_\_\_\_\_

ENGAGEMENT LETTER: \_\_\_\_\_

MATTER: \_\_\_\_\_

[ ] After meeting with you, the firm has decided not to represent you in this matter. In declining to represent you in this matter, we are not expressing any opinion concerning the merits of your case. Please sign and date to indicate your understanding.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date