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| --- | --- | --- |
| Date: |  |  |
|  |
| **Client information** |
| Assigning Rep: | Phone: | Ext: | Email: |
| Company: | Mailing address: |
| Social Media: |
| Attorney: | Mailing address: |
| Case name: | Claim number: | Budget: |
| Who/which party does client represent? | Bill to: | Address Report To: |
| **Report handling** | **Special Notes** |
| [ ]  Email [ ]  Mail [ ]  Fax |  | Call to discuss before proceeding | Investigator to status client from field |
|  |
| **Client Information:** | **Subject Information:** *(multiple subjects use separate forms)* |
| [ ]  Litigation support | [ ]  AOE/COE | Subject name: |  |
| [ ]  Worker’s compensation | [ ]  Site investigation: | Subject address: |  |
| [ ]  liability | [ ]  Hospital/pharmacyPhysician search | Phone number: |  |
| [ ]  Other insurance |  | Social security: |  |
| [ ]  Corporate workplace | [ ]  Service of process | Date of birth: |  |
| [ ]  Background  | [ ]  Domestic | Driver’s license no./state: |  |
| [ ]  Locate | [ ]  Document retrieval | Subject’s occupation: |  |
| [ ]  Asset | [ ]  Due diligence | Next medical appointment: |  |
| [ ]  surveillance | [ ]  Other | Treating physician/ Address: |  |
| [ ]  Activity check |  | Specific injuries/Limitations: |  |
| [ ]  Live & well check |  | Height:  |  | Hair color: |  | Sex: |  |
|  |  | Weight: |  | Race: |  | Have Photo? |[ ]
| [ ]  Subject represented | [ ]  Rush | Other physical description: |  |
|  |  | Married: |  | Kids: |  | Vehicle: |  |
| Deposition Taken? | [ ]  Prior investigation | Date of loss: |  |  |
|  |  |  |  |
|  |
| **Secure** |
| [ ]  Police/traffic collision report | [ ]  Personal file | [ ]  Medical authorization | [ ]  Medical records | [ ]  Other records |
|  |
|  |
| Important dates | [ ]  Trial/hearing |  |  | **Video Format:** | [ ]  USB | [ ]  Dropbox and Portal |
|  | [ ]  Decision date |  |  |  |
|  |
| **\* Special Instructions:** |
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