



CLIENT INTAKE FORM

Your Name Business Name Address Business Address Phone Business Phone Email Business Email Original Document viewed - copy attached\* Current occupation/status Driver's License Passport Birth Certificate Other (specify):

Other party/ parties information:

Name Business Address Address Business Phone Phone Email: (Is there another person or business involved? Please email their name and contact information now.)

\*\*I need assistance and/or representation with the following issues: (Please note: a referral may be required)

- I need general legal assistance Traffic Ticket Breach of Contract dispute My Human Rights were violated Tenant or Landlord issue I need to collect a debt Municipal by-law issue I need to defend myself in court I'm being sued/ I want to sue Arrested/Charged I need to collect a debt I need a Notary I was injured at work Other (please specify):

MEDIATION

I and the other party require a/an:

- Elder Care/ Estate agreement Workplace agreement Parental Coordination agreement Separation/ Divorce agreement Landlord/Tenant agreement Other (please specify):

This intake form with a completed Full Consultation of \$200/hr (+HST) flat fee is charged. Please provide an Original Document to verify your identity required for our records. Clear photos of your driver's licence, birth certificate, PR card, or passport is sufficient. Once we complete the full consultation, you will be our client, and we will make sure your needs are addressed through the next phase and/or through completion. We charge unbundled, block fees and/or a subscription retainer, and by signing this form you agree to pay the fees for service (unbundled or block fees), or will complete a Retainer Agreement and deposit \$1000.00 to commence your file.

I hereby acknowledge that I have read the above and understand that ERB Legal, LLP will not act on my behalf until this initial written fee agreement is signed, and the flat fee is received and accepted.

Signature \_\_\_\_\_

Date \_\_\_\_\_