



Initial Client Consultation Information Sheet

The purpose of an initial consultation with **Henry-Taylor Law, P.C.** (“Us, We, Our”) is for Us to advise you, the *prospective* client what, if anything, may be done for you, and what the minimum fee therefore will be. *The purpose is not to render a definitive legal opinion* as 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:

- A. You desire to have Us represent you and We desire to represent you;**
- B. We decline representation; or**
- C. You decide not to use Our services.**

It is important to note that even if, after the initial consultation, you desire to have Us represent You and We desire to represent You, Our actual representation of you does not begin until both parties have signed the Engagement Letter, a separate document which sets forth the specific terms and conditions of Our representation.

Note: The following questions will help Us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

IMPORTANCE OF MAINTAINING CURRENT CONTACT INFORMATION

While it is impossible to predict the course of a representation, it may be important for Us to contact you immediately, or upon short notice, to confer with you regarding the status of your case. An inability to do so may result in your case being prejudiced and detrimentally affect the outcome of the case. Accordingly, you agree to keep Our office informed of your current address, telephone number and whereabouts. If you leave town, for example, to travel on business or vacation, please notify Our office before leaving of the expected duration of the trip and how We may contact you while you are away.

EMAIL COMMUNICATION

Many attorney-client communications via email involve relatively innocuous information and do not present a great concern even if they are received or read by someone other than you. On the other hand, any communication from an attorney that can be accessed by others may be of concern in some situations. Please think carefully about your email process. Do individuals who are not parties to this matter have access to your email? For example, if emailing from home or a smartphone, does someone else have access to the computer/smartphone from which you send/receive your email or to your email account? Is your email account password-protected? If emailing from work, does your employer reserve the right to view all email traffic on its servers? Most do. Note that any unprotected access to email communications between you and Our attorneys may raise issues of whether the attorney-client privilege was waived, and if so, the communication may be available for review and use by the adverse party.

Anytime you communicate via email with one of Our attorneys, include only the attorney in the communication. DO NOT “cc” or “bcc” other parties to the action, adverse counsel, judges, family, friends, relatives, or ANYONE else.

USE OF SOCIAL MEDIA (e.g., Facebook, Twitter, Blog)

Information currently on your social media site may potentially have an impact on your case, either positively or negatively. Information you place on your social media site in the future may also potentially affect your case. Generally, it is NOT advisable to discuss your case, including but not limited to the merits or details, the opposing party, counsel, the judge, witnesses, and the like, in any open forum. NEVER discuss with ANYONE, or disclose in any manner, discussions We have with you regarding your case, whether on a social media site or in any setting. Please review your social media sites promptly. If you have any questions regarding how a prior entry or posting may potentially affect your case, please feel free to discuss the issue with Us as soon as possible.

BACKGROUND

Name _____
Last First Middle or Maiden

Address _____
Number Street City State Zip

Home Phone (____) _____ Cell Phone (____) _____

Email Address: _____

Social Media Addresses: _____

Criminal History: _____

Drug and Alcohol History: _____

Other Parties in Household: _____

Prior Court Cases: _____

OPPOSING PARTY BACKGROUND

Name _____
Last First Middle or Maiden

Address _____
Number Street City State Zip

Home Phone (____) _____ Cell Phone (____) _____

Email Address: _____

Social Media Addresses: _____
(e-mail links to Traci@jpmyslaw.com)

Criminal History: _____

Drug and Alcohol History: _____

Other parties in Household: _____

Prior Court Cases: _____

INFORMATION REGARDING CURRENT MATTER

Has a Complaint been filed against you? _____

If "Yes," please provide the following:

Docket Number: _____

Date filed: _____

County in which Complaint filed: _____

Are there other parties involved? (Examples: a friend, an employer, a neighbor, signor of a contract, etc. This should include people or parties on either side of your issue)

Party _____ Relationship _____

Party _____ Relationship _____

Party _____ Relationship _____

If your matter involves an incident which was witnessed by others, please provide the following information:

Name of Witness(es):

1. _____ Phone No. _____ Relationship: _____

2. _____ Phone No. _____ Relationship: _____

3. _____ Phone No. _____ Relationship: _____

Briefly explain what you may need advice about or assistance with today:

Please continue on the back of the page, if necessary.

On the lines below, list the documents (papers) that you think may help us to understand the issues.

(1) _____

(2) _____

(3) _____

(NOTE: Any documents you supply that are important to your matter will be photocopied, with your permission, and your originals returned to you at the conclusion of the initial interview.)

Ideally, if things turn out precisely the way you want, what would the outcome be?

Knowing that there are no guarantees, what can you accept?

Please classify your urgency in concluding this matter? (Check One)

Critical – Personal safety or continuation of business depends on it.

Very important – severe hardship, personal or financial inconvenience if matter is not resolved quickly.

Important – Matter interferes with business or personal financial stability.

Needs to be done, but no immediate hardship in the interim.

Just thought I'd see if it was worth pursuing, but I'm not counting on anything

Just wanted to know what my rights are? I'll then let you know after I think about it.

If the matter involves payment to you of money you feel you are owed, how long can you wait before not getting paid? _____

(Days, Weeks, Months, Years)

Are we the first attorneys you have consulted regarding this matter? Yes No

If "No," why didn't you hire the attorney(s) with whom you previously consulted?

GENERAL

Have you ever been represented by an attorney before? Yes No

If Yes, please state the circumstances: _____

Marital Status: Married Single Divorced Widowed Separated

Driver's License # _____ Social Security # _____

Are you known by any other names? Yes No

If yes what name(s) _____

(A fictitious name, a nickname, a former name,
your maiden name etc.)

EMPLOYMENT

Current Employer: _____
Current Salary: Gross/Month: \$ _____
Work Phone No.: _____
Work Email Address: _____

May we contact you at work? By Phone: Yes No; By Email: Yes No

How long have you worked for your current employer? _____

If employed by your current employer less than one year, please provide your previous place of employment: _____

Reason for leaving: _____

EMERGENCY CONTACT

If your mail is returned as undeliverable or your telephone service terminated, please provide the name of someone (friend or relative) you believe will always know how to contact you.

Name _____ Relationship _____

Address _____ Phone No. (____) _____

City _____ State & Zip _____

PAYMENT

How will you pay for your attorney's fees in this matter?

Check today Cash today Contingency Fee On Account
 Credit Card Credit Card No. _____ Expr. Date _____

If someone other than you will be responsible for paying your attorney's fees in this matter, please provide the following:

Name of Payor: _____

Address: _____

Phone No. _____

Relationship to You: _____

How did you learn of our office? A friend Yellow Pages Bar Referral
 Our Web Page Former client Other (Please explain): _____

PLEASE READ CAREFULLY and SIGN BELOW

As previously provided, the Law Office of Nicola Henry-Taylor does not represent you with regard to the matters set forth by you in this Information Sheet or discussed during your consultation with Us, unless and until, both you and We execute a written Engagement Letter.

If We do not agree to represent you, this means We will not be representing you with regard to the matter set forth by you on this Information Sheet, or any other matters you may have discussed with Us during your consultation. If your legal problem(s) involve a potential lawsuit, it is important that you realize a lawsuit must be filed within a certain period of time called a Statute of Limitations. Conversely, if your legal problem(s) involve responding to a complaint, it is important that you realize that a response must be filed by you to the complaint within a certain period of time. Therefore, regardless of your legal problem, We strongly urge you to *immediately* consult with another attorney to protect your rights. Our decision not to represent you should not be taken by you as an expression regarding the merits of your case.

Your signature acknowledges only that you received a copy of this completed Information Sheet. It DOES NOT mean you have hired Henry-Taylor Law.

SIGNATURE _____ Date ___ / ___ / ___

This portion to be completed by the Attorney

[] Will represent (see New Case Memo and Engagement Letter attached)

Date Accepted: _____

Fee Arrangement:

Estimated Flat: \$ _____

Hourly Rate: \$ _____

Retainer Received: \$ _____

Estimated Expenses: \$ _____

Referral Source: _____

- Will investigate and report (Schedule a follow-up conference for ____ days)
- Representation declined - Letter of declination will be sent.
- Prospective Client will “think about it” and get back with us - No action to be taken and prospective client was so informed.
- Prospective Client declined Representation at this time.

Interviewed by _____ this ____ day of _____

Notes/Timeline: _____

