



INTAKE FORM FOR MECHANICS LIEN

This intake form is intended to gather the necessary information related to the Notice requirements, as well as the subsequent filing requirements, to secure a Mechanics lien against the property of your customer until such time as all outstanding monies have been paid. Please be precise and accurate with the data you provide as our successful performance will be directly based on the data you provide. If you have any questions, please reach out to the firm immediately and an associate will be able to help. Our contact information can be found at the bottom of the page.

Preliminary Information:

Company Name: _____
Company Mailing Address: _____

Phone: _____ - _____ - _____
Email: _____
Individual License Holder: _____

Relationship & Scope of Work

Who are you in Relation to the customer; are you:

- a. Direct Contractor
- b. Sub-Contractor
- c. Materials and or Supplier

Define the scope of labor or good delivered or to the customer:

Who Engaged the Labor or Materials

Customer & Company Name: _____
Company Mailing Address: _____

Responsible Individual: _____
Phone: _____ - _____ - _____
Email: _____

Who is the Construction Lender:

Name: _____
Address: _____

Parties to be noticed:

Property Owner

Name: _____
Phone: _____ - _____ - _____
Email: _____
Address: _____

Construction Lender

Name: _____
Phone: _____ - _____ - _____
Email: _____
Address: _____

Direct Contractor

Name: _____
Phone: _____ - _____ - _____
Email: _____
Address: _____

Other Party

Name: _____
Phone: _____ - _____ - _____
Email: _____
Address: _____

Price:

What is the estimated price for labor, services, equipment or materials to be provided: \$ _____

Time Fram:

When was this Document Submitted: _____

What day did the labor or delivery of materials occur: _____

Submission:

Once you have completed this Intake form, please return it at your earliest convenience Kelley & Associates, preferably by email or in person as the clock is ticking for us to execute the Notice Requirement. Our firm has **20 Days** to give notice to the proper individuals and companies, and by the time we confirm that the data provided is correct, we also need to prepare documents, have them reviewed by our team of attorneys, and finally submitted for certified or registered mail by the United Staes Postal Service.

What to Expect Next

The next step in the process requires both you and Kelley & Associates to act:

- a. **Payment:** The first expectation is payment. We cannot process any documents until such time as your account is paid in full. This can be accomplished through out online portal on Kelley-assoc.com, by check, had delivered or delivered by mail to 255 E Rincon #32121.
- b. **Notice:** Once payment has been received, Kelley & Associates will prepare the documents necessary to deliver notice to the individuals and companies who are both entitled and legally required to receive such notice. You will be notified of our successful sending of Notice when you or your company or, you as an individual, receives such effective Notice.