

# Intake Legal Interview Form

## Personal Information

Last Name: \_\_\_\_\_ First: \_\_\_\_\_ Middle: \_\_\_\_\_

Aliases: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ Place of Birth: \_\_\_\_\_

U.S Citizen:  Yes  No If No, Country of Citizenship: \_\_\_\_\_

SSN: \_\_\_\_\_ Driver's License: \_\_\_\_\_

Address: \_\_\_\_\_

Phone Number: \_\_\_\_\_ Work Number: \_\_\_\_\_

Cell Number: \_\_\_\_\_ Email Address: \_\_\_\_\_

Where may we contact you? \_\_\_\_\_

Employer Name: \_\_\_\_\_ Position Title: \_\_\_\_\_

Annual Income: \_\_\_\_\_ How did you hear about us? \_\_\_\_\_

## Legal Matter

Nature of Legal Matter: \_\_\_\_\_

Urgency:  1 (Just investigating my rights)  2  3  4  5 (Critically important)

Desired Outcome: \_\_\_\_\_

Acceptable Outcome: \_\_\_\_\_

Relevant Documents: \_\_\_\_\_

## Other Involved Parties

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

Name: \_\_\_\_\_ Relation: \_\_\_\_\_

## Previous Legal Consultation on This Matter

Attorney: \_\_\_\_\_ Law Firm: \_\_\_\_\_ Date: \_\_\_\_\_

Why didn't you hire this attorney? \_\_\_\_\_

## Prior Legal Counsel on Other Matters

Attorney: \_\_\_\_\_ Law Firm: \_\_\_\_\_ Dates: \_\_\_\_\_

Circumstances: \_\_\_\_\_