

CLIENT INTAKE SHEET

Today's Date: _____

Client's name: _____

Nickname: _____

Client's address: _____

City, State, and Zip: _____

Is it okay to mail at this address? _____

Alternate address for mailing: _____

Phone number: Home _____

Work _____

Cell _____

Email _____

Client's occupation: _____

Spouse's name: _____

Referral: _____

(Source: friend, telephone book, or colleague)

Client's issue: _____

Social Security No.: _____

Date of Birth: _____

Hobby: _____

Reason for requesting attorney's assistance (Tell us about your case): _____

Do you currently have an attorney? _____ If so, who and what type of legal matter? _____

May we also help you with any of the following legal matters?

1. ____ Personal Injury 2. ____ Divorce 3. ____ Child Custody 4. ____ Name Change
5. ____ Will 6. ____ Contract 7. ____ Appeal 8. ____ Criminal 9. ____ Business

HAVE YOU WORKED WITH ANY OTHER ATTORNEYS? If yes, who are they?

Consultation only until written retainer agreement.

CLIENTS SURVEY FORMS:

Your name (optional): _____

So that we can serve you better, please take a few moments to fill out this form.

1. How did you hear about our services?
2. How do you find out about most lawyers' services? (Word of mouth, Friend, T.V., Radio, Newspaper, etc)
3. What do you look for in a lawyer?
4. Which services do you need most often? (Criminal, Personal, Injury, Family, Real Estate, Contracts, other _____)
5. Did you find this location easily and accessible?
6. What are some of your pet peeves about the legal system and what are suggestions for improvement?
7. What can a lawyer do to earn your business and respect?
8. What can lawyers do to make their services known to the community?
9. Do you prefer morning or afternoon appointments?
10. What is the first impression that you have of a lawyer or lawyer's office? (The lawyer, staff, office environment, customer service)
11. In the past, have you received satisfactory customary service from professionals such as doctors, lawyers, accountants, or others? (that is nice greeting, feeling that you are important and appreciated, concern regarding your issue) Explain.
12. What do you suggest for good customer service? _____
13. Do you feel more comfortable in an environment of diversity such as blacks, whites, others, or an environment made up of just members of one race or nationality? Why? Explain.
14. Have you worked with a lawyer before? _____ If so, with whom _____

CONSULTATION ONLY UNTIL WRITTEN RETAINER AGREEMENT

LAW OFFICES OF VERONICA E. BRINSON & ASSOCIATES, LLC.

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I, _____, understand that this is a consultation only and unless and until Law Offices of Veronica E. Brinson & Associates, LLC. completes a retainer agreement with me or as otherwise noted by Law Offices of Veronica E. Brinson & Associates, LLC., the consultation does not create an attorney-client relationship. The consultation alone does not obligate Law Offices of Veronica E. Brinson & Associates, LLC. to do anything on my behalf and nothing will be done on my behalf unless otherwise noted by Law Offices of Veronica E. Brinson & Associates, LLC. until I have retained Law Offices of Veronica E. Brinson & Associates, LLC. and completed a retainer agreement.

Please make sure you have copies of any and all documents that you leave with us for consultation. If you do not have copies of your documents, you will need to keep your original documents or the documents that you brought to us. We do not want to have the only copies that you have of any documents, pictures, etc. that you may have in that this is a consultation only and no attorney-client relationship is created until a retainer agreement has been signed and executed.

So dated, this _____ day of _____ 2018.
(day of the month) (month)

Potential Client's Signature

Law firm's Staff Signature

