

Client Intake Form

The purpose of this form is to gather the information needed by the Attorney of Copeland & Trust LLC before scheduling an initial consultation. The purpose of an initial consultation is for the attorney 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 and the Attorney mutually agree to the terms of representation, or (After a separate document called an Agreement for Representation is signed a copy will be provided to you.)

B. The Attorney declines representation, or

C. You decide not to use the services of the Attorney.

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

Last Name: _____

First Name: _____

Middle Initial: _____

Are you known by any other names? Yes No

If yes name(s): _____ (A fictitious name, a nickname, a former name, your maiden name etc.)

Address

Street: _____

City: _____ State: _____

Zip: _____

Contact Information

Home Phone (_____) _____

Primary Contact Number Work Phone (_____) _____

Primary Contact Number Cell Phone (_____) _____

Email: _____

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

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 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 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 their services?

Have you ever been represented by an attorney before? Yes No If Yes – Please state the circumstances

How did you learn of our office: A friend Former Client
 Our Web Page Web Search (Google, etc.)
 Other:

PLEASE READ CAREFULLY AND ACKNOWLEDGE BELOW

Following your initial interview, if you agree to hire the Attorney, and the Attorney agrees to represent you, you will both sign an Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation.

If the Attorney is willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with the Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

NOTICE: This office does not represent you with regard to the matters you set forth in this information sheet or discussed during your consultation unless and until, both you and the Attorney execute a written Agreement for Representation.

If the Attorney does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, nor any other matters you may discuss with the Attorney 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. Therefore, the Attorney strongly urges you to immediately consult with another attorney to protect your rights. The Attorney's 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 and does not mean you have hired the Attorney.

I acknowledge that completion of this form does not mean that I have hired this firm or any attorney working for this firm. I understand that unless and until both myself and the

Attorney have executed a written Agreement for Representation, neither firm nor any attorney working for this firm represents me in this matter

Signature

_____/_____/_____
Date

Signature

_____/_____/_____
Date