



CLIENT INTAKE FORM

The purpose of an initial consultation is for the attorney to advise you, the prospective client, what, if anything may be done for you regarding your legal matter. The purpose is not to give you a definitive legal opinion since it may be impossible to fully assess your legal problem within the time frame allotted for an initial consultation or with the documentation and/or information that you may be able to provide at the initial consultation.

One of the following three results is possible at the end of the initial consultation:

1. You and the attorney mutually agree to the terms of representation; after a separate document entitled "Representation Agreement" is signed by both you and the attorney, you will be provided with a copy.
2. The attorney declines to represent you.
3. The attorney tells you that he/she needs additional time and investigation before deciding whether to represent you.

Name: _____
First Middle Initial Last

Maiden name: _____ **Aliases used:** _____

What name do you prefer to be called: _____

Address: _____
Street Apt. Number

City State Zip Code

Phone Numbers: (_____) _____ (_____) _____ (_____) _____
Home Cell Work

Email: _____ **Birthday:** _____

Which is your preferred way of being contacted: Home phone [] Cell phone [] Email []

We provide green or paperless invoicing (i.e. via email attachment). Would you like to receive your invoices in this way? Yes [] No [] If yes, at what email? _____

Marital status: Married [] Single [] Divorced [] Separated [] Widowed [] Domestic Partner []

Are you employed? Yes [] No [] If yes, where? _____

For how long? _____ **May we contact you there?** Yes [] No []

Social Security Number: _____ **Driver's License State and No:** _____

Emergency Contact: If your mail is returned as undeliverable or if your telephone service is disconnected, please provide the name and contact information of someone who you believe will always know how to contact you (preferably someone who does not live with you)

Name: _____
First Middle Initial Last

Relationship to you: _____ Does this person live with you? Yes [] No []

Address: _____
Street Apt. Number

City State Zip Code

Phone Numbers: (_____) _____ (_____) _____ (_____) _____
Home Cell Work

Email: _____

How did you learn of Avanti Law?:

website www.avanti-law.com: []

other website: [] name of website: _____

friend: [] name: _____

directory: [] name: _____

bar association referral: [] _____

other: [] _____

Have you ever been represented by an attorney before? Yes [] No [] If yes, for what type of matter?

Briefly describe the legal matter you need advice about today:

Describe the parties involved: (for example, former employer, supervisor, landlord, other party that signed a contract). Include parties on both sides of the matter.

Party: _____ Relationship: _____

Party: _____ Relationship: _____

Party: _____ Relationship: _____

Has another attorney represented you in this matter? Yes [] No [] If yes, why did the representation end?

Have you seen other attorneys about this matter? Yes [] No [] If yes, why did you not hire this attorney's services? _____

Describe the documents that you think are important to this matter. If you have copies of these documents, they should be provided to the attorney.

Ideally, if things turned out precisely as 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:

- Critical: personal safety or continuation of business depend on it
- Very important: severe hardship, personal or financial inconvenience if matter is not resolved immediately
- Important: matter interferes with personal or business financial stability
- Needs to be done, but no personal or business 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 right are

If the matter involves a payment of money to which you feel you are entitled, how long can you wait before receiving the money? (days, weeks, months, years) _____

PLEASE READ CAREFULLY AND SIGN BELOW

Following your initial interview, if you agree to hire the attorney and the attorney agrees to represent you, you will both sign a Representation Agreement. If you do not sign this separate agreement, Attenza Law does not represent you in the matter you and the attorney discussed today. The Representation Agreement sets forth the terms and conditions of the representation and establishes the obligations of both you and Attenza Law under the agreement.

If the attorney is willing to represent you and you do not want to sign the Representation Agreement today, you are urged to set up a second appointment with the attorney at the earliest possible time or consult with a second attorney in order to preserve your legal rights.

If this attorney decides not to represent you, this means that Attenza Law does not represent you in the matter you discussed with the attorney today, or in any other legal matter. If your potential legal matter involves a lawsuit, it is important to know that a lawsuit must be filed within a certain period of time called a statute of limitations. Therefore, you are strongly urged to immediately consult with another attorney to protect your legal rights. The decision of Attenza Law not to take your case and represent you is not a reflection of the merits of your case or on any possible outcome.

Your signature only means that you have read and understood this form and that you have received a copy of it. It does not mean that you have hired the attorney, or that Attenza Law represents you.

Signature _____ Date _____

This section to be completed by the attorney:

- Will represent. (see attached New Case Memo and Representation Agreement)
- Will investigate and report (schedule a follow-up conference in _____ days)
- Representation declined (declination of representation letter will be sent)
- Party will "think about it" and get back to us. No action will be taken unless party contacts the firm.
- Party declined representation.

Interviewed by: _____ Date: _____

Notes:
