

NEW CLIENT INFORMATION SHEET

The purpose of an initial consultation is to assess whether my legal services can be of use to you and, if so, to discuss the fees for my services. It may not be possible to make that determination given the time allotted for our meeting or with the information that you can provide. Following our consultation, you may decide not to retain me or I may decline to represent you. For me to act as your attorney, you and I must agree in writing to the terms of my representation.

TODAY'S DATE _____
Client's Full Name _____ SS# _____
Client's Former Name/ Other Names Used _____
Spouse's/Partner's Full Name _____ SS# _____
Spouse's/Partner's Former Name/ Other Names Used _____
Street Address _____
City/State _____ Zip _____ E-mail Address _____
Telephone (Home) _____ Client Work _____ Spouse/Partner Work _____
Client's Employer _____ Spouse's/Partner's Employer _____
Emergency Contacts:
Name _____ Relationship _____ Telephone _____
Name _____ Relationship _____ Telephone _____
Why You Chose Our Office _____
Conference With Attorney Regarding: _____

FOR OFFICE USE ONLY

Fee arrangement: _____
Billing arrangement: _____

DOCKET CONTROL	
Statute of Limitations Deadline	
Tort Claims Act Notice Due	
First Appearance Due	
Other Deadlines	
File Review Frequency	
INSTRUCTIONS:	

CONFLICT CONTROL	
NAME	RELATIONSHIP

File opened by _____ Conflicts checked by _____ Deadlines docketed by _____
 Engagement letter sent by _____ Date: _____