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### **Initial Client Consultation Interview 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, and what the minimum fee for the work 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.

Please note that this consultation DOES NOT establish an attorney-client relationship. An attorney-client relationship is only formed once you have signed a contract for representation with this firm and have paid the retainer fee.

**Please answer the following questions to help us understand the reason for your visit today.  
Your responses are protected by attorney/client privilege and will be held in strict confidence.**

Name \_\_\_\_\_  
Last First Middle or Maiden

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 \_\_\_\_\_  
Number Street City State Zip

Marital Status: [ ] Married [ ] Single [ ] Divorced [ ] Widowed [ ] Separated

DOB: \_\_\_\_\_

Home Phone (\_\_\_\_) \_\_\_\_\_ Work Phone (\_\_\_\_) \_\_\_\_\_

Other Phone (\_\_\_\_) \_\_\_\_\_ Email: \_\_\_\_\_

Driver's License Number: \_\_\_\_\_

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

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Are there other parties involved? (Examples: a spouse, a friend, an employer, a neighbor, signor of a contract, etc. This should include people or parties on either side of your issue)

Party \_\_\_\_\_ Relationship \_\_\_\_\_

Ideally, if things turn out precisely the way you want, what would the outcome be?

\_\_\_\_\_  
\_\_\_\_\_

Are we the first attorneys you have consulted regarding this matter?  Yes  No

If No – Who did you consult and why didn't you hire their services? \_\_\_\_\_

\_\_\_\_\_

How did you learn of our office?  A friend  Yellow Pages  Bar Referral

Former client  Other \_\_\_\_\_

**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 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 use the services of the Attorney, OR if the Attorney does not agree to represent you (i.e., declines representation of you), this includes not representing you with regard to the matter as conveyed by you on this information sheet and/or when scheduling your initial consultation as well as any other matters you may have discussed with the Attorney during such consultation, and if payment is due, you will be asked to make that payment before you leave the office.

Please note, 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 if you decided not to hire this Firm or if this Firm decided not to represent you.

If the Attorney decided not to represent you, 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 have received this Initial Client Consultation Interview Form; that you have read this Form; that you have completed this Form to the best of your ability; that you understand that the initial interview and receipt and completion by you of this Form DOES NOT mean you have hired this FIRM.**

SIGNATURE: \_\_\_\_\_ Date \_\_\_\_\_

Printed Name: \_\_\_\_\_