Model Tool: New client intake form

Why you need this form:

Before accepting a client, you should obtain as much information about both the client and the subject matter as possible. This process, known as "client screening" can help you avoid many potential problems.

How this form helps you:

The New Client Intake Form will not only help you quickly identify whether or not the subject matter is within your area of expertise, but it may also help bring to light any unreasonable expectations your potential client has with respect to outcome and/or time required to complete the file.

How to use this form:

Have this form completed and signed by a potential new client and review it carefully before determining whether or not to accept the new client.

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Law Firm of ________________
New Client Intake Form

Name:_______________________________SSN:____________________________

Company Name:____

Home Address: ____

Office Address: ____

Cell Phone: ____________________ Office Phone:__________________________

Email Address: ___________________ Accounting Contact:____________________

How did you hear about us?____

Attorney preference:____

Type of representation sought:

[ ] Banking/regulatory

[ ] Bankruptcy/foreclosure

[ ] Commercial litigation

[ ] International

[ ] Mining Law

[ ] Oil and Gas

[ ] Real Estate

[ ] Tax and Estate Planning

[ ] Personal Injury

[ ] Divorce/Custody

[ ] Other: _______________________

Parties involved:____

Relationship of Parties:____

Outcome sought:____

Method of payment:____

Was prior legal representation sought for this matter? Yes ___ No ___

If yes, from whom?____

Why was relationship terminated?____

Are there any outstanding legal fees owed to the other firm? Yes ___ No ___

____

I hereby certify that all information contained herein is accurate and correct to my knowledge. I acknowledge that completion of this form does not guarantee acceptance as a client. I further understand that additional information will be requested of me upon meeting with representatives of ____________________ and I will provide said information.

_________________________   ______________________________________

Date   Signature

<u>This section to be completed by firm</u>

Conflicts:	**Notes:**	**Accept as client?**