

Model Tool: New matter intake form

Why you need this form:

Before accepting a new matter from an existing client, you should obtain as much information about the new case as possible. This process, known as “case screening,” can help you avoid many potential problems.

How this form helps you:

The New Matter 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 bring to light any unreasonable expectations your 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 your client and review it carefully before determining whether or not to accept the new matter.

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Law Firm of _____
New Matter 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:

- | | |
|---|--|
| <input type="checkbox"/> Banking/regulatory | <input type="checkbox"/> Real Estate |
| <input type="checkbox"/> Bankruptcy/foreclosure | <input type="checkbox"/> Tax and Estate Planning |
| <input type="checkbox"/> Commercial litigation | <input type="checkbox"/> Personal Injury |
| <input type="checkbox"/> International | <input type="checkbox"/> Divorce/Custody |
| <input type="checkbox"/> Mining Law | <input type="checkbox"/> Other: _____ |
| <input type="checkbox"/> Oil and Gas | |

Parties involved: _____

Relationship of Parties: _____

Outcome sought: _____

Method of payment: _____

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

Has all work-in-progress for this client been billed? 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 of new matters by this firm. I further understand that additional information will be requested of me upon meeting with representatives of _____ and I will provide said information.

Date

Signature

This section to be completed by firm

Conflicts:	Notes:	Accept as matter?

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