

**[Client Intake Sheet]**

*Note to Attorney: Modify this as needed*

File Number: \_\_\_\_\_ Date Form Completed:

New Client:  Prior Client:

Client: \_\_\_\_\_ SS#: \_\_\_\_\_

Spouse: \_\_\_\_\_ SS#: \_\_\_\_\_

Address:

Home Telephone:

Client Employer:

Telephone:

Spouse Employer:

Telephone:

Insurance Information:

Emergency Contact(s): (Name) (Relationship) (Telephone)

Case Name And Number:

Area Of Law:

Originating Attorney:

Assigned Attorney(s):

Referred By (Client Or Attorney?):

*Initial And Date The Following Items When Completed:*

Conflict Check: \_\_\_\_\_ Fee Contract:

Engagement Letter: \_\_\_\_\_ Docket Entered:

Statute Of Limitations/Time Deadline: