

Client Intake Form

The purpose of this form is to gather the information needed by the Paralegal before scheduling an initial consultation. 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 therefor 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. One of three outcomes is possible following your consultation.

A. You and the Paralegal mutually agree to the terms of representation, or (After a separate document called an Agreement for Representation is signed a copy will be provided to you.)

B. The Paralegal declines representation, or

C. You decide not to use the services of the Paralegal.

Note: The following questions will help us to understand the reason for your consultation. Your responses are protected by Paralegal/client privilege and will be held in strict confidence.

Name

Last: _____

First: _____

Middle: _____

Birth date: _____

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.)

Marital Status: Single Married Separated Divorced Common-Law

Home Address: is Mail?

Street: _____

City: _____ Province: _____ Postal Code: _____

Company Name : _____ Job Title: _____ Profession: _____

Work Address: is Mail?

Street: _____

City: _____ Province: _____ Postal Code: _____

Contact Information

Home Phone (_____) _____ Primary Contact Number

Work Phone (_____) _____ Primary Contact Number

Cell Phone (_____) _____ Primary Contact Number

Home Email: _____

Work Email: _____

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Briefly explain what you may need advice about or assistance with today, also give information about your pronouns and other details:

Please classify your urgency in concluding this matter? (check one)

Critical – Personal safety or continuation of business depends on it.

Very important – severe hardship, personal or financial inconvenience if matter is not resolved quickly.

Important – Matter interferes with business or personal financial stability.

Needs to be done, but no immediate hardship in the interim.

Just thought I'd see if it was worth pursuing, but I'm not counting on anything.

Just wanted to know what my rights are? I'll then let you know after I think about it.

If the matter involves payment of money you feel you are owed, how long can you wait before not getting paid? _____

(Days, Weeks, Months, Years)

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

If No – Why didn't you hire their services?

Have you ever been represented by an Paralegal before? Yes No

If Yes – Please state the circumstances

How did you learn of our office:

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PLEASE READ CAREFULLY AND ACKNOWLEDGE BELOW

Following your initial interview, if you agree to hire the Paralegal, and the Paralegal 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 Paralegal is willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with the Paralegal at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

NOTICE: This office does not represent you with regard to the matters you set forth in this information sheet or discussed during your consultation unless and until, both you and the Paralegal execute a written Agreement for Representation.

If the Paralegal does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, nor any other matters you may discuss with the Paralegal during your consultation. 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 Paralegal strongly urges you to immediately consult with another Paralegal to protect your rights. 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 received a copy of this completed information sheet and does not mean you have hired the Paralegal.

[] I acknowledge that completion of this form does not mean that I have hired this firm or any Paralegal working for this firm. I understand that unless and until both myself and the Paralegal have executed a written Agreement for Representation, neither firm nor any Paralegal working for this firm represents me in this matter.