

# Arnold & Arnold, Ltd.

ATTORNEYS AND ADVISORS AT LAW

## Initial Client Consultation Intake Form

Date Form Completed: \_\_\_\_\_

New Client

Existing Client

Marital Relationship:    Single    Married    Divorced    Widowed    Separated

**Client:** \_\_\_\_\_ SS# \_\_\_\_\_    Male    Female

Have you ever used, or been known by, any other name than that shown above?

Yes    No

If yes, list here each other name, and state when and why each other name was used:

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Citizenship:    United States    Other: \_\_\_\_\_

**Spouse:** \_\_\_\_\_ SS# \_\_\_\_\_    Male    Female

Have you ever used, or been known by, any other name than that shown above?

Yes    No

If yes, list here each other name, and state when and why each other name was used:

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Citizenship:    United States    Other: \_\_\_\_\_

Client Address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ May we contact you at this number?      Yes      No

Cell Phone: \_\_\_\_\_ May we contact you at this number?      Yes      No

Email Address: \_\_\_\_\_

Spouse Address: \_\_\_\_\_

Same as address above

Home Telephone: \_\_\_\_\_ May we contact you at this number?      Yes      No

Cell Phone: \_\_\_\_\_ May we contact you at this number?      Yes      No

Email Address: \_\_\_\_\_

Client Employer: \_\_\_\_\_

Telephone: \_\_\_\_\_ May we contact you at this number?      Yes      No

Spouse Employer: \_\_\_\_\_

Telephone: \_\_\_\_\_ May we contact you at this number?      Yes      No

List the names and ages of all children:

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

List the names and ages of all stepchildren:

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

Child: \_\_\_\_\_ Age: \_\_\_\_\_

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

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Are there any other parties involved?

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

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

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

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

Is Arnold & Arnold, Ltd. the first law firm you have consulted regarding the issue stated above?    Yes    No

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

If yes, please state the law firm/attorney name and the circumstances:

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How did you learn about Arnold & Arnold, Ltd.?

Firm Website    Friend/Colleague    Former Client    Bar Referral

Other: \_\_\_\_\_

Generally a majority of our communication is done via mail. Are you willing to accept non-confidential communication via email?    Yes    No