



ABSOLUTE LAW GROUP

BUSINESS - TAX - ESTATE PLANNING

INITIAL CLIENT CONSULTATION INTERVIEW FORM

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 therefore 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 documents) that you may be able to provide at the initial consultation

One of three outcomes is possible following your consultation:

1. *You and the Attorney 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.)
2. The Attorney declines representation, (OR)
3. You decide not to use the services of the Attorney.

Your responses are protected by attorney/client privilege and will be held in strict confidence.

Last Name: _____

First Name: _____ **Middle or Maiden** _____

Street Address: _____

State: _____ **City:** _____

Home Phone: _____ **Cell phone:** _____

May we send you appointment reminders via text message? _____

Email: _____

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

Are there other parties involved? (Examples: a friend, an employer, a neighbor, signor of a contract, etc. This should include people or parties on either side of your issue)

Party: _____

Relationship: _____

Party: _____

Relationship: _____

Party: _____

Relationship: _____

On the lines below, list documents (papers) that you think may help us understand the issues:

1. _____

2. _____

3. _____

NOTE: Any documents you supply that are important to your matter will be photocopied, with your permission, and your originals returned to you at the conclusion of the initial interview.

Ideally, if things turn out precisely the way you want, what would the outcome be?

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.

Are we the first law firm you have consulted on this matter?

Yes

No

If no, why did you not hire their services? _____

Have you ever been represented by an attorney before?

- Yes
- NO

If yes, please state the circumstances: _____

How will you pay for your attorney's fees in this matter?

- Check
- Cash
- Contingency Fee
- On Account
- Credit Card

If paying with credit card:
Credit Card No. _____ Exp. Date _____ CID _____
(Please note, credit card will not be charged without prior authorization)

Marital Status

- Married
- Single
- Divorced
- Widowed
- Separated

Driver's License # _____ Social Security #: _____

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.)

If your mail is returned as undeliverable or your telephone service terminated, please provide the name of someone (friend or relative) you believe will always know how to contact you.

Name: _____

Relationship: _____

Street Address: _____

State and Zip Code: _____ Phone number: _____

How did you learn/find our office?

Friend

Google Search

Former Client of Absolute Law Group

Present Client of Absolute Law Group

Bar Referral

Newspaper Ad

Other: _____

Following your initial interview, if you agree to hire *the Attorney*, and *the Attorney* 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 Attorney 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 Attorney 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 set forth by you herein in this information sheet or discussed during your consultation, unless and until, both you and the Attorney execute a written Agreement for Representation.

If the Attorney 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 Attorney 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 Attorney strongly urges you to immediately consult with another attorney 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 Attorney.

Name (print) _____

Signature: _____