



## SAMPLE CLIENT INTAKE FORM

### NEW POTENTIAL CLIENT INTAKE SHEET

|                                   |  |
|-----------------------------------|--|
| <b>Date of Contact</b>            | 3/11/2021  |
| <b>Method of Contact (Circle)</b> | Phone, Email, Web Form, Web Chat                               |
| <b>Source (Circle)</b>            | Return Client, Google, Yellow Pages, Avvo, Lawyers.com, Person |
| <b>Referral Note</b>              |  |

|                |  |        |        |      |  |
|----------------|--|--------|--------|------|--|
| Salutation     |  |        |        |      |  |
| First Name     |  | Middle |        | Last |  |
| Home Address   |  |        |        |      |  |
| City           |  | State  |        | Zip  |  |
| Home Phone     |  |        | Mobile |      |  |
| Personal Email |  |        |        |      |  |
| SSN            |  |        | DOB    |      |  |

|                  |  |       |  |     |  |
|------------------|--|-------|--|-----|--|
| Employer         |  |       |  |     |  |
| Business Address |  |       |  |     |  |
| City             |  | State |  | Zip |  |
| Business Email   |  |       |  |     |  |
| Website          |  |       |  |     |  |
| Title            |  |       |  |     |  |

|                |  |        |        |      |  |
|----------------|--|--------|--------|------|--|
| Spouse / Other |  |        |        |      |  |
| First Name     |  | Middle |        | Last |  |
| Home Address   |  |        |        |      |  |
| City           |  | State  |        | Zip  |  |
| Home Phone     |  |        | Mobile |      |  |
| Personal Email |  |        |        |      |  |
| SSN            |  |        | DOB    |      |  |

|                  |  |       |  |     |  |
|------------------|--|-------|--|-----|--|
| Employer         |  |       |  |     |  |
| Business Address |  |       |  |     |  |
|                  |  |       |  |     |  |
| City             |  | State |  | Zip |  |
| Business Email   |  |       |  |     |  |
| Website          |  |       |  |     |  |
| Title            |  |       |  |     |  |

|                         |
|-------------------------|
| <b>Nature of Matter</b> |
|                         |

|                               |           |
|-------------------------------|-----------|
| <b>Date of Incident/Issue</b> | 3/11/2021 |
| <b>Attorney Assigned</b>      |           |
| <b>Date Assigned</b>          | 3/11/2021 |