

WARNING AND DISCLAIMER: The information herein was prepared by The Bar Plan Mutual Insurance Company for general information purposes, and should not be construed as legal advice or legal opinion with regard to any specific circumstance or set of facts. The reader must conduct independent research and analysis to determine all possible and appropriate legal and ethical issues that might apply to a specific situation and the best way to address these issues in the jurisdiction where the reader is located.

Sample Law Firm Intake Form

Please note: This form should be modified to meet the facts of the individual case.

Client Contact Information

Name: _____

Address:

Home Phone: _____

Cell Phone: _____

Work: _____

Emergency Contact

Name Phone Number

Marital Status:

Married Single Divorced Widowed Separated

Drivers License # _____ **Social Security #** _____

Are you known by any other names? Yes No **If yes name(s)**

E-Mail

Many e-mail attorney-client communications involve relatively innocuous information and do not present a great concern even if they are intercepted. On the other hand, any communication from an attorney that can be accessed by others may be of concern in some situations. Please think carefully about your email process. Do other persons, who are not parties to this matter, have access to the email? For example, if e-mailing from home, does your spouse or other family also have access to the computer and e-mail program? If e-mailing from work, does your company reserve the right to view all e-mail traffic on their servers? By and large, most do. Any unprotected access to our e-mail communications may raise issues of whether the attorney-client privilege was waived, and if so, the communication may be available for review and use by the adverse party.

Anytime you communicate with your attorney, include only the attorney in the communication. DO NOT “cc” other parties to the action, adverse counsel, judges, family, friends, relatives, or ANYONE else.

Where is the computer you use for e-mail: _____

Does anyone else use or have the ability to use that computer: _____

Is that computer connected to a network: _____

E-mail Address: _____

Where are you currently employed?

May we contact you there? _____

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

Name: _____

Relationship: _____

Address:

Phone No. (____) _____

Briefly describe the type of legal matter for which you are seeking consultation:

What are your goals for this representation?

Are there deadlines/statutes of limitations?

XX Yes ___ No (If No, please describe why not) _____

If yes, please review the following:

Your Determination of the Date of Incident: _____ **10/22/2011** _____
Year Month Day

Source Relied On _____ **Client Intake Interview** _____

Verified on insurance or police report: Yes **XXX** ___ No _____

Jurisdiction: Missouri Other

Statute of limitations: _____

REMINDER- REVIEW APPLICABLE STATUTE OF LIMITATIONS
Attach Copy of Applicable Statute to This Form

Applicable deadline based upon date of the incident: _____

Calculation Reviewed By: _____

- All deadline calculations should be reviewed and confirmed by another attorney in the firm

Date Calendared BY: _____

Date Calendared WHEN: _____

Calendared Date Confirmed BY: _____

Is Matter Subject to Kansas 90-Day Service Statute?

XX Yes _____ No (If No, please describe why not)

Date Matter Filed: _____
Date 90-Day Deadline Calendared: _____
Calendared By: _____
Calendared Date Confirmed By: _____

Date Service Obtained: _____

Does Client Have a Social Media Page (Facebook, Twitter, Blog)

Yes: _____ No: _____

Information currently on your social media site may potentially have an impact on your case, either positively or negatively. Information you place on your social media site in the future may also potentially affect your case. Generally, it is advisable NOT to discuss the merits or details, the opposing party, counsel, judge, witnesses, etc., of your case in any open forum. NEVER discuss with ANYONE, or disclose in any manner, discussions we have with you regarding your case, whether on a social media site or any setting. Please review your social media sites promptly. If you have any questions regarding how a prior entry or posting may potentially affect your case, please feel free to discuss the issue with us.

Opposing Party

Name: _____

Relationship to Client: _____

Additional Information: _____

Related Parties (Screen for Potential Conflicts of interest)

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____