

Potential Client Information Sheet

PRIVACY NOTICE: Communications with attorneys are covered by the attorney-client privilege. The information on this sheet is requested to help us determine whether we can assist you, and to open a file. **Completing this form does not mean we agree to represent you.** We will not disclose the information you provide to us, even if you do not hire us, to anyone else except under order of court or except as required in order to provide legal services to you or to transact our business, which may include the investigation of creditworthiness or the collection of payments due.

Identification

Name Last: _____ First, M.I.: _____
Driver's Lic.: _____ SSN: _____
Date of Birth (m/d/yyyy) _____

Contact Information

Address (h): _____ Employer: _____
Phone (H): () _____ Work: () _____ EXT.: _____
Fax () _____ Cell/mobile: () _____
Pager () _____ Other: () _____
E-Mail _____@_____ E-mail (alt): _____@_____
May we contact you at work? Phone: Yes No OK to E-mail? Yes No

Referral

Are you a previous client? Yes No
How did you hear of us? (Check all that apply)
 Attorney: _____ Other client _____
 Family or friend _____ Bar association Yellow Pages
 Internet Search: (site) _____ General community reputation
 In neighborhood/building Other: _____

Conflict of Interest Check:

All other parties involved: _____

Nature of Legal Matter(s) (check all you may think apply)

- Business advice**
 - Startup or general advice
 - Contract Review
 - Employer-Employee
- Intellectual Property**
 - Copyright
 - Trademark
 - Trade Secrets
 - Licensing
 - Computer/Internet
 - Other: _____
- Real estate / land use**
 - Buying
 - Selling
 - Building
 - Land use
 - Lease or rental issue
- Wills & Estates**
 - Will or Trust
 - Living Will
 - Power of Attorney
 - Other Estate Planning
 - Estate Administration (relative's or friend's death)
- Family Law**
 - Adoption
 - Guardianship
 - Abuse
 - Separation
 - Dissolution of Marriage
 - Pre-Nuptial
 - Post-Dissolution Issues
- Litigation or Dispute (other than above)**
 - Contract
 - Property
 - Debt Collection
 - Personal Injury
 - Civil Rights
 - Employment
 - Defamation
 - Other: _____
- Other:** _____

Payment

The Law Offices of Jeff Smith provides legal services on an hourly basis. Other arrangements may be made in appropriate cases. A retainer will be requested in most cases. How do you plan to pay?
 Cash Check Credit card (paypal only): _____

I represent that the above information is true and correct and I acknowledge that Jeffrey P. Smith will rely on this information in evaluating my legal matter and deciding whether to represent me.

Signed: _____ Date: _____