

DATE: _____

FILE NO.: _____

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 will be. *It is not our purpose 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 and/or documents that you may be able to provide at the initial consultation.

One of three outcomes is possible following your initial consultation:

- A. **You and the attorney mutually agree to the terms of representation (and a separate document, which may be an Engagement Agreement or an Agreement for Representation, will be signed, with a copy being provided to you)**
- B. **The attorney declines representation**
- C. **You decide not to use the services of the attorney.**

Note: the following questions will help us to understand the reason for your visit and are required in order for you to meet with an attorney today.

Name _____

	Last	First	Middle or Maiden
Address _____	Number	Street	City
			State
			Zip Code

Marital Status: Married Single Divorced Widowed Separated

Spouse's Name _____

Are you known by any other names? If yes, please list the names _____

Date of Birth _____ Social Security Number _____

Driver's License Number _____

Main Phone (____) _____ Cell Phone Home Phone (____) _____

Fax (____) _____ E-Mail _____ Work Phone (____) _____

Work Email _____ May we contact you at work? Yes No

Profession _____ Name of Employer _____

Address _____
Number Street City State Zip Code

How did you learn of our office?

- Personal Referral** _____
 - Davis Miles McGuire Gardner Employee
 - Friend/Family

- Internet**
 - davisiles.com
 - mcguiregardner.com
 - freearizonabankruptcysseminar.com
 - yourarizonadivorcelayyer.com
 - bankruptcylawyeraz.com
 - arizona-injury-lawyer.com
 - LawInfo.com
 - Pay per click online ad (Reachlocal)
 - Google Search

Dex Phone Book

- Flagstaff
- Phoenix
- Prescott
- Winslow

Local Pages Phone Book

- Payson
- Globe
- Prescott

Money in the Mail Coupon Book

- Flagstaff
- Prescott
- Prescott Valley

Savvy Shopper Coupon Book

- Legal Shield** (formerly known as Pre-Paid Legal Services, Inc.)

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

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

Name _____ Relationship _____

Name _____ Relationship _____

Name _____ Relationship _____

On the lines below, list the documents (papers) that you think may help us to 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?

Knowing that there are no guarantees, what can you accept? _____

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** – No immediate hardship in the interim.
- Exploring Options** – Just checking to see if it is worth pursuing, but not counting on anything.
- Just want to know** – Want to know my rights and then may pursue after I think about it.

If the matter involves payment to you of money you feel you are owed, how long can you go without getting paid (Days, Weeks, Months, Years)? _____

Are we the first attorneys you consulted regarding this matter? Yes No

If no, why didn't you retain their services? _____

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

If yes, please state the circumstances. _____

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 _____

Last

First

Middle or Maiden

Address _____

Number

Street

City

State

Zip Code

Main Phone (____) _____ Cell Phone Fax (____) _____

Work Phone (____) _____

Do you have a will or trust? Yes No

If your answer to the above question is "yes," when is the last time that your will or trust was updated? _____

PLEASE READ CAREFULLY & SIGN BELOW:

Following your initial interview, if you agree to hire the Attorney, and the Attorney agrees to represent you, you will both sign an Engagement Agreement or an Agreement for Representation. The Engagement Agreement or 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 Engagement Agreement or an Agreement of Representation today, you are strongly urged to schedule a second appointment with an Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

NOTICE: The State Bar of Arizona requires that there be a clear understanding by both the attorney and the client as to scope of engagement and fees, prior to commencing formal representation. Therefore, please note that 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, that includes not representing you with regard to the matter set forth by you on this information sheet as well as 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.

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

This portion to be completed by the Attorney

- Will represent (see Engagement Agreement/Agreement for Representation attached)
- Will investigate and report (Schedule a follow-up conference for ___ days)
- Representation declined by attorney/law firm - Letter of declination will be sent.
- Party will "think about it" and get back with us - No action to be taken and party was so informed.
- Client declined Representation at this time.

Interviewed by _____ this ___ day of _____

Notes: _____

