

# CLIENT INTAKE FORM

DATE \_\_\_\_\_

NAME \_\_\_\_\_

ADDRESS \_\_\_\_\_

STREET

APARTMENT NUMBER

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CITY

STATE

ZIP CODE

TELEPHONE NUMBER(S) \_\_\_\_\_

HOME

WORK

MOBILE/OTHER

EMAIL ADDRESS(ES) \_\_\_\_\_

HOW DID YOU HEAR ABOUT US \_\_\_\_\_

SERVICE(S) REQUESTED (CHECK ALL THAT APPLY – FILL OUT ADDITIONAL QUESTIONNAIRE FOR APPLICABLE SERVICES) \_\_\_\_\_

**FAMILY LAW MATTERS**

- Divorces
- Legal Separations
- Child Support
- Wage Assignment
- Pre-Nuptial, Marital and Property Agreements
- Stipulations
- Annulments
- Spousal Support

**REAL ESTATE MATTERS**

- Quit Claim Deeds
- Warranty Deeds
- Death Affidavits
- Rental Leases

**PROBATE LAW MATTERS**

- Living Wills
- Advanced Health Care Directives
- Powers and Limited Powers of Attorney
- Conservatorships
- Living Trusts
- Guardianships

**LITIGATION LAW MATTERS**

- Small Claims – Complaints
- Responses
- Interrogatories

**BUSINESS FORMATIONS**

- Corporations
- Non-Profits
- Partnerships
- Limited Liability Company (LLCs)
- Tax/EIN/TIN
- Assumed Business Names/DBA
- Business Licenses
- Reinstatement
- Registered Agent Services
- Annual Reports
- Amendments

**BANKRUPTCY SERVICES**

- Chapter 7
- Chapter 13
- (Our bankruptcy petition preparation services are free and offered as an add on service through our affiliate CP | Financial Solutions Group. Please contact us for further details.)

**OTHER SERVICES**

- DOCUMENT PRODUCTION SERVICES**
- Word Processing/Document Processing
- NOTARY SERVICES**
- Notarizations

**COMPANY USE ONLY – DO NOT FILL OUT BELOW THIS LINE**

DATE RECEIVED \_\_\_\_\_ CUSTOMER NUMBER \_\_\_\_\_

TOTAL PROJECT COST \_\_\_\_\_ DEPOSIT AMOUNT \_\_\_\_\_

DEPOSIT PAID      YES      NO      BALANCE DUE \_\_\_\_\_

PROJECT START DATE \_\_\_\_\_ PROJECT END DATE \_\_\_\_\_

DOCUMENT PRODUCTION SPECIALIST \_\_\_\_\_

BALANCE PAID      YES      NO      EMAILED TO CLIENT      YES      NO

WERE ADDITIONAL CHANGES REQUESTED      YES      NO