

## 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 fee will be. The purpose is not 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 documents that you may be able to provide at the initial consultation. One of three outcomes is possible following your consultation:

1. You and the Attorney mutually agree to the terms of representation, OR
2. The Attorney declines representation, OR
3. You decide not to use the services of the Attorney.

Note: The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name: \_\_\_\_\_

Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ ZIP: \_\_\_\_\_

Preferred phone number: \_\_\_\_\_

May we leave a detailed message?  YES  NO  Leave NO MESSAGE at this number

Please give us another phone number where we may reach you in an emergency: \_\_\_\_\_

Office  Home  Other

May we leave a detailed message?  YES  NO  Leave NO MESSAGE at this number

Driver's License # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Or: State ID# \_\_\_\_\_ Commercial Drivers License # \_\_\_\_\_

SID # \_\_\_\_\_

Are you known by any other names?

Yes-If so, list : \_\_\_\_\_

No

Are you a US Citizen?  YES  NO Immigration Status \_\_\_\_\_

Marital Status:  Married  Single  Divorced  Widowed  Separated

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. If you will give us permission to copy the documents, please give them to the paralegal now.

If DWI or DUI, have you been charged with endangering a child?  YES  NO

Please list all currently pending offenses & cause nos. here:

Offense 1: \_\_\_\_\_

Cause No. 1: \_\_\_\_\_

Offense 2: \_\_\_\_\_

Cause No. 2: \_\_\_\_\_

Offense 3: \_\_\_\_\_

Cause No. 3: \_\_\_\_\_

Court: \_\_\_\_\_

When is your court date? \_\_\_\_\_

Did you have a breath or blood test?  YES What was the BAC? \_\_\_\_\_  
 NO  Don't know

Did you mail or fax the ALR to DPS?  YES date \_\_\_\_\_  NO

Has an ALR hearing date been set?  YES date \_\_\_\_\_  NO

PR Bond  Attorney Bond  Cash Bond  Bail Bondsman

Please list any prior convictions:

| County | State | Court # | Cause No. | Offense | Outcome |
|--------|-------|---------|-----------|---------|---------|
|--------|-------|---------|-----------|---------|---------|

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Ideally, if things turn out precisely the way you want, what would the outcome be?

Knowing that there are no guarantees of success, what is the minimum you can 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 or problems if not resolved quickly.
- Important - Matter interferes with business or personal financial stability.
- Needs to be done, but no immediate hardship in the interim.
- Just thought I'd see if it was worth pursuing, but I'm not counting on anything
- Just wanted to know what my rights are

Are we the first attorneys you have consulted regarding this matter?

- Yes
- NO—If No - Why didn't you engage their services?

Have you ever been represented by an attorney before?

Yes

NO

If Yes - Please state the circumstances

Where are you employed? \_\_\_\_\_

May we contact you there?  Yes  No Work Phone No. (\_\_\_\_) \_\_\_\_\_

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

Name: \_\_\_\_\_

Relationship: \_\_\_\_\_

Street Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: (\_\_\_\_) \_\_\_\_\_

Whom may we thank for the referral to this office?

Self-referred from mailing to you

A friend; Name: \_\_\_\_\_

Former client; Name: \_\_\_\_\_

Referral from Attorney—Name: \_\_\_\_\_

Referral from other business source—Name: \_\_\_\_\_

Yellow Pages  Bar Referral  Internet  Educational seminar/workshop

Self-referred—read an article authored by attorney, heard a radio interview, heard a speech, etc.

Other: \_\_\_\_\_

**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 Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation.

**NOTICE:** 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, this includes not representing you with regard to the matter set forth by you on this information sheet, nor 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 \_\_\_\_ / \_\_\_\_ / \_\_\_\_

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This portion to be completed by the Attorney

- Will represent (see contract attached)
- Will investigate and report (Schedule a follow-up conference for \_\_\_\_ days)
- Representation declined - Letter of declination will be sent.
- Party will think about it and get back with us in \_\_\_\_ days - send FULTR
- Client declined Representation at this time.

Interviewed by John Fahle \_\_\_\_\_, 2005

TR:

- FULTR
- TEL1--10--CC
- TEL2--12--FUAPP
- TEL3 JF 15