

INITIAL CONSULTATION QUESTIONNAIRE

The following information will help me understand how I can serve you and must be provided at or before your initial consultation. Your responses are protected by attorney/client privilege and will be held in strict confidence. **Completion of this form will not create an attorney-client relationship.** During the initial consultation, we will discuss your situation and assess what, if anything, I can do to assist you. One of three outcomes is possible following your consultation:

- We agree to the terms of representation and sign a fee agreement;
- I decline to represent you; or
- You decide not to use my services.

Name: _____

Home Address: _____

Home phone: _____ Cell phone: _____

May I leave you messages on this line? yes no

May I leave you messages on this line? yes no

Business: _____

Business Address: _____

Business phone: _____ Fax: _____

May I leave you messages on this line? yes no

May I fax documents to you on this line? yes no

Email: _____

Briefly explain what you need assistance with: _____

Are there any other parties involved? Examples include friends, an employer, a neighbor, a signor of a contract, people or parties on the other side of your issue, etc.

Name: _____ Relationship: _____

Name: _____ Relationship: _____

Name: _____ Relationship: _____

List any documents (papers) that you think may help me understand the issues.

1.) _____

2.) _____

3.) _____

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, 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. I'll let you know after I think about it.

Am I the first attorney you have consulted regarding this matter? Yes No

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

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

If yes, please explain the circumstances. _____

How will you pay for your attorney's fees in this matter? Check Cash Credit card

How did you learn about Porter Law? _____

PLEASE READ CAREFULLY & SIGN BELOW

Following your initial interview, if you agree to hire me, and I agree to represent you, we will sign a Fee Agreement, which will set forth the terms and conditions of representation. **I do not represent you with regard to the matters written in this document or discussed during your consultation, unless and until, we execute a written Fee Agreement.**

If I am is willing to represent you, and you decide not to sign a Fee Agreement at the initial consultation, you are strongly urged to schedule a second appointment with me at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

If I do not agree to represent you, this includes not representing you with regard to the matter written on this information sheet or any other matters you may discuss with me 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, I strongly urge you to ***immediately*** consult with another attorney to protect your rights. My 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 me.

Signature: _____ Date: _____