

# Law Office of Ronald L. McNabney, PC

## General Client Intake Form

The purpose of an initial consultation is for Ronald L. McNabney to advise you, the *prospective* client, what if anything, may be done for you, and what the minimum fee therefore 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 (information or documents) that you may be able to provide at the initial consultation.

One of three outcomes is possible following your consultation.

- A. You and Ronald L. McNabney mutually agree to the terms of representation, or (After a separate document called an Agreement for Representation is signed a copy will be provided to you.)
- B. Ronald L. McNabney declines representation, or
- C. You decide not to use the services of Ronald L. McNabney.

**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** \_\_\_\_\_  
Last, First \_\_\_\_\_ Middle \_\_\_\_\_ Maiden \_\_\_\_\_

**Address** \_\_\_\_\_  
Number \_\_\_\_\_ Street \_\_\_\_\_ City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

**Home Phone** (\_\_\_\_) \_\_\_\_\_ **Work** (\_\_\_\_) \_\_\_\_\_ **Mobile** (\_\_\_\_) \_\_\_\_\_

**Marital Status:**  Married  Single  Divorced  Widowed  Separated **Date of Birth** \_\_\_\_\_

**Drivers License #** \_\_\_\_\_ **Social Security #** \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

**Are you known by any other names?**  Yes  No

**If yes name(s)** \_\_\_\_\_  
(A fictitious name, a nickname, a former name, your maiden name etc.)

**Where are you employed?** (Name of company/organization, name of supervisor, address)

\_\_\_\_\_  
\_\_\_\_\_

**May we contact you there?**  Yes  No **If Yes, Phone No.** (\_\_\_\_) \_\_\_\_\_

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

**Name** \_\_\_\_\_ **Relationship** \_\_\_\_\_

**Address** \_\_\_\_\_ **Phone No.** (\_\_\_\_) \_\_\_\_\_

\_\_\_\_\_ **State & Zip** \_\_\_\_\_

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

\_\_\_\_\_  
\_\_\_\_\_

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

**Party** \_\_\_\_\_ **Relationship** \_\_\_\_\_

**Party** \_\_\_\_\_ **Relationship** \_\_\_\_\_

**Party** \_\_\_\_\_ **Relationship** \_\_\_\_\_

3. On the lines below, list the documents (papers) that you think may help us to understand the issues.

- A. \_\_\_\_\_
- B. \_\_\_\_\_
- C. \_\_\_\_\_

(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.)

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

---

---

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

---

---

6. 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 then let you know after I think about it.

7. If your situation involves payment of money you feel you are owed, what is the longest time you wait before not getting paid? \_\_\_\_\_ (Days, Weeks, Months, Years)

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

If No – Why didn't you hire their services?

---

---

9. Have you ever been represented by an attorney before?  Yes  No If Yes – Please explain:

---

---

10. How will you pay for your attorney's fees in this matter?

- Check today  Cash today  Cash and Check  Contingency Fee  Payments \_\_\_\_\_
- Credit Card Credit Card No. \_\_\_\_\_ Exp. Date \_\_\_\_\_

11. How did you learn of our office?  A friend  Yellow Pages  Bar Referral  Former Client  Other

If other, describe: \_\_\_\_\_

**PLEASE READ CAREFULLY & Sign Below**

Following your initial interview, if you agree to hire Ronald L. McNabney and Ronald L. McNabney 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.

If Ronald L. McNabney is willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with Ronald L. McNabney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

**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 Ronald L. McNabney execute a written Agreement for Representation.

If Ronald L. McNabney does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, or any other matters you may discuss with Ronald L. McNabney 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, Ronald L. McNabney strongly urges you to

