

Law Offices of
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Reply to Upland Office

This information is confidential and is used to identify you and to check for potential conflicts of interest.

NAME: FIRST MIDDLE LAST

ADDRESS: CITY STATE ZIP

RESIDENCE PHONE # BUSINESS PHONE# CELL PHONE #

E-MAIL ADDRESS _____

PLACE OF EMPLOYMENT: _____

ADDRESS: CITY STATE ZIP

POSITION: _____ HOW LONG? _____

DATE OF BIRTH DRIVER'S LICENSE NO. SOCIAL SECURITY NO.

NEAREST RELATIVE RELATION PHONE NUMBER

REFERRED BY: _____

TYPE OF ACTION OR
LEGAL PROCEEDING: _____

INITIAL FEE AND SCOPE OF SERVICES TO BE PROVIDED:

I understand that there is a \$150.00 fee for an initial consultation of up to one hour, payable at the conclusion of the initial consultation. By completing this form and meeting with the Attorney both parties are agreeing only to an initial consultation. If you do not agree to hire the Attorney for further services, or if the Attorney does not agree to provide further services, neither of you will have any further obligations after the initial consultation. Any confidential or privileged information you provide to the Attorney will remain confidential or privileged even if the Attorney is not hired to provide further services.

SIGNATURE DATE

* ADDITIONAL INFORMATION IS ON THE REVERSE OF THIS FORM*

SOCIAL SECURITY NUMBERS

Social Security information will only be used in the event you hire the Attorney to represent you in your legal matter and then only when necessary in limited use during the course of your matter.

Social Security numbers are collected and used to positively identify parties, to check for conflicts of interest, and in certain estate planning and probate services where Social Security numbers are required.

Information received from a client, including their social security number, is confidential and is not released unless authorized by the client or required in the course of representation.

FURTHER REPRESENTATION AFTER YOUR INITIAL CONSULTATION

Following your initial consultation, if you agree to hire the Attorney for further services and the Attorney agrees to represent you, you will both sign a written Legal Services (Retainer) Agreement. The Legal Services Agreement will set forth the terms and conditions of representation, including fees. Estate planning services and business formation services are generally flat fees. In ordinary probates, fees are set by statute. Contingency fee arrangements may be available on selected matters. Most legal services are billed on an hourly rate, Attorney's current rate is \$425 per hour. Your Legal Services Agreement will set forth the specific fee arrangements for your matter.

If your legal problems 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. If the Attorney is not hired to provide further services, you are strongly urged you to immediately consult with another attorney to protect your rights. If the Attorney does not agree to represent you, the Attorney's decision not to represent you should not be taken by you as an expression regarding the merits of your case.

FOR ATTORNEY USE

- Will represent, Legal Services Agreement executed to be sent
- Representation declined by Attorney
- No further action to be taken and party was so informed
- Client declined Representation at this time

Notes: _____

