

THE LEONE LAW FIRM

www.leonelawcolorado.com

POTENTIAL CLIENT INTAKE SHEET

NOTE: In order for the Firm to evaluate a potential client engagement, it is necessary that you provide the information requested below. This permits the Firm to evaluate whether the potential representation would conflict with existing professional obligations to current or former clients. It also ensures proper file set-up if the Firm accepts the engagement. Keep in mind that your delivery of this form does not obligate the Firm to represent you or take any action on your behalf. A separate, signed, written fee agreement is required to formalize engagement of the Firm as counsel in your matter.

Client	Business or Person(s) seeking representation:		SSN/EIN:	Today's Date:
Contact	Your Name:		Referred By:	
Address	Primary Mailing Address:		Billing Address (if different):	
Contact Numbers	Work Phone:	Home Phone:	Brief Description of Matter / Nature of Case:	
	Cell Phone:	Fax #:		
Email	Your electronic mail address:			
If Proposed Client is a Business	Type: <input type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> LLC	<input type="checkbox"/> Sole Proprietorship <input type="checkbox"/> Non-Profit <input type="checkbox"/> Other (describe)	List all owners & percentage holdings:	
Opposing Party or Parties	List all persons or business entities having an adverse or opposing interest:			
Other Interested Person(s)	Persons or entities who are involved, but whose interests you do not consider adverse:			

OFFICE USE ONLY CLIENT ACCEPTED : Y N (NOTES: _____)

FEE AGMT: SENT SIGNED RETAINER _____ PAID _____

FEE TYPE: H F C M: _____

CONFLICT CHECK S: DONE (DATE): _____ BY: _____ File Set Up Done.