

Sample Initial Interview Checklist For Domestic Matter

I met with _____ on _____, 20____
regarding _____
I performed a conflicts check on: _____

We discussed the following issues: _____
Date of Separation: _____
Custody Visitation Move Away
Child Support I did / did not run support calculations
Spousal Support Amount: _____ Duration: _____
Restraining Orders re _____
Division of real property _____ Valuation of real property _____
Characterization of real property _____
Business Interests _____ Bank Accounts _____ Personal Property _____
Employee Benefits _____ Medical Insurance _____
Collection of past due support _____ Wage assignment _____
Stock Options _____ Stocks and Bonds _____
Advised client of right to seek counsel on issues outside the scope: _____
Other: _____

We discussed the following coaching options: _____

I gave the client the following materials:
 Issues checklist Service/Tasks checklist Fee agreement # _____
 Client's Guide to Limited Legal Services
Handout re restraining orders Handout re personal property division
Blank Court forms: _____
Other: _____

Attorney initials

Client initials