Appointment Date & Time: Interviewing Attorney:

**Consultation Form1**

# TO BE COMPLETED BY STAFF MEMBER FOR PROSPECTIVE CLIENT2:

Date: Name: Phone Number: Email: Alternate Contact Name & Phone Number:

Re:

Served with papers: When: Court Date: Judge: What Parish: Other Side’s Name: Referred By: Have you or anyone you know been here before? Who?

Do you have or have you spoken to an attorney in this matter? Who?

Told to bring in paperwork pertaining to consultation:

Adverse Party Checked: Conflicts List Checked: Non-Client Interview List Checked3:

OK? OK? OK?

Form completed By:

Attorney’s Instructions:

1 Note to Attorney: Modify this as needed.

1. The first page of this form is used by the staff member to obtain basic information from a potential client prior to setting an appointment. The attorney will review it and give additional instructions.
2. The Non-Client Interview List is a list of people interviewed and the attorney-client relationship was never established. There may be a conflict if confidential information was obtained from the non-client.

# TO BE COMPLETED BY PROSPECTIVE CLIENT BEFORE THE CONSULTATION4:

Client: DOB: SS#:

Address:

Home Telephone: Cell: Fax:

Personal email: Work email: Client’s Employer: Client’s Position: Employer Telephone: Spouse: Spouse’s Employer: Spouse’s Employer Telephone: Emergency Contact(s), (Name) (Relationship) (Telephone):

Names of Associated and/or Related Parties: Name of Opposing Counsel: Please state briefly the nature of the problem you wish to discuss with the attorney:

**TO BE COMPLETED BY STAFF:**

Initial and Date the Following Items When Completed:

Fee Contract

Engagement Letter

Case Entered on Master List

Prescription/Time Deadline/Hearing Date

Form Completed By:

1. Prospective client completes this section when she comes in for appointment immediately prior to the consultation. The attorney again searches for conflicts before seeing the prospective client.