



CONFIDENTIAL CLIENT INTAKE SHEET

Your legal question or issue:

To help prepare for our initial meeting, please provide the following information:

If you own a home, what is the value, in today's market:

What is the payoff amount of all mortgages and equity loans on your home:

Are you current on your mortgage payments:

If not, how much would it take to bring the mortgage payments current today:

Are you married/living with a domestic partner:

What is your approximate, average income; indicate whether the amount is gross (before taxes) or net (after taxes), and how often (weekly, bi-weekly, twice a month, etc.) you are paid:

If your spouse or partner works, his/her income (gross or net, and how often - weekly, bi-weekly, twice a month, etc.) are they paid:

How many children, and other family members who are dependent on you, live with you?

I recognize that these seemingly routine questions can have complicated answers. When we meet, we will go over all the details of these and other aspects of your financial situation.