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Initial Client Consultation Interview Form

The purpose of an initial consultation is for the attorney to advise you, the *prospective* client what, if anything, may be done for you, and what the minimum fee therefore will be. *The purpose is not to render a definitive legal opinion* as it may be impossible to fully assess a matter within the time frame allotted for a consultation or with the information or documents that you may be able to provide at the initial consultation.

One of three outcomes is possible following your consultation.

- A. You and the Attorney mutually agree to the terms of representation, or**
(After a separate document called a Retainer Letter is signed & a copy will be provided to you.)
- B. The Attorney declines representation, or**
- C. You decide not to use the services of the Attorney.**

Note: The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name _____
Last First Middle or Maiden

Address _____
Number Street City State Zip

Home Phone (____) _____ Work Phone (____) _____ Cell Phone (____) _____

Email Address(es) _____

Briefly explain what you may need advice about or assistance with today:

Please continue on the back of the page.

Are there other parties involved? (Examples: a friend, an employer, a neighbor, signor of a contract, etc. This should include people or parties on either side of your issue)

Party _____ Relationship _____

Party _____ Relationship _____

Is there an active court case on this matter? Y N If yes, please provide the case number & court jurisdiction: _____

On the lines below, list the documents (papers) that you think may help us to understand the issues.

(1) _____

(2) _____

(NOTE: Any documents you supply that are important to your matter will be photocopied, with your permission, and your originals returned to you at the conclusion of the initial interview.)

Ideally, if things turn out precisely the way you want, what would the outcome be?

Knowing that there are no guarantees, what can you accept?

Please classify your urgency in concluding this matter? (Check One)

- Critical – Personal safety or continuation of business depends on it.
- Very important – severe hardship, personal or financial inconvenience if matter is not resolved quickly.
- Important – Matter interferes with business or personal financial stability.
- Needs to be done, but no immediate hardship in the interim.
- Just thought I'd see if it was worth pursuing, but I'm not counting on anything
- Just wanted to know what my rights are. I'll then let you know after I think about it.

If the matter involves payment to you of money you feel you are owed, how long can you wait before not getting paid? _____

(Days, Weeks, Months, Years)

Are we the first attorneys you have consulted regarding this matter? Y N

If No - Why didn't you hire their services? _____

Have you ever been represented by an attorney before? Y N

If Yes - Please state the circumstances _____

How will you pay for your attorney's fees in this matter?

Check today Cash today Credit Card Debit Card

Marital Status: Married Single Divorced Widowed Separated

Driver's License # _____ Social Security # ____ - ____ - _____

Date of Birth ____/____/_____

Are you known by any other names? Y N

If yes what name(s) _____
(A fictitious name, a nickname, a former name, your maiden name etc.)

Where are you employed? _____

May we contact you there? Y N Phone No. (____) _____

If your mail is returned as undeliverable or your telephone service terminated, please provide the name of someone (friend or relative) you believe will always know how to contact you.

Name _____ Relationship _____

Address _____ Phone No. (____) _____

City _____ State & Zip _____

How did you learn of our office? friend (*name*) _____ Yellow Pages

Bar Referral Our Web Page Former client (*name*) _____

Other _____

PLEASE READ CAREFULLY & SIGN BELOW

Following your initial interview, if you agree to hire the Attorney, and the Attorney agrees to represent you, you will both sign a Retainer Letter. The Retainer Letter will set forth the terms and conditions of representation.

If the Attorney is willing to represent you and you decide not to sign the Retainer Letter today, you are strongly urged to schedule a second appointment with the Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights. You will be charged Attorney's usual hourly rate on all future appointments and telephone calls.

Timing and deadlines are always important in legal matters and are often critical. In certain legal matters, failure to timely respond or file documents could result in legal ramifications. If the Attorney does not agree to represent you, Attorney strongly urges you to immediately consult with another attorney to protect your rights and to file any necessary documents on your behalf. If you do not have another attorney in mind, you can contact the legal referral service of The Florida Bar at 1-800-342-8060. The Referral Service maintains a list of lawyers who may be able to assist you. Please remember the Attorney's decision not to represent you should not be taken as an expression regarding the merits or strength of your case.

NOTICE: This office does not represent you, unless and until, both you and the Attorney execute a written Retainer Letter. Until such time as we have a signed Retainer Letter, we will not monitor the status of your case. This includes monitoring any approaching deadlines, hearings, meetings, mediations, etc.

PAYMENT IS DUE AT THE CONCLUSION OF THE INITIAL CONSULTATION APPOINTMENT.

Your signature acknowledges only that you have read and acknowledge the information

contained in this information sheet and does not mean you have hired/retained the Attorney.

I hereby acknowledge that I have read and understand the information contained in this Client Information Sheet.

SIGNATURE _____ Date ____/____/____

THIS PORTION TO BE COMPLETED BY ATTORNEY

- Will represent (*see notes below & Retainer Letter*)
- Will investigate and report (Schedule a follow-up conference for ____ days)
- Representation declined – Decline Representation Letter will be sent.
- Party will “think about it” and get back with us - No action to be taken and party was so informed.
- Client declined Representation at this time.
- 30 days 60 days 90 days Other: _____

This ____ day of _____ 20____ Signature _____

Notes: _____

Initial Consult Duration:	Initial Consult Fee Due:
Amount of Payment:	Method of Payment:
Fee Arrangement:	

Retainer Letter Sent: _____ Deadlines docketed: _____

File Opened: _____ Clio Matter Opened: _____