

FORSYTH, CUBBAGE & ASSOCIATES, P.C.

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John E. Forsyth

Stephen B. Cubbage, of counsel

CLIENT INTAKE 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 therefor 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.

1. One of three outcomes is possible following your consultation.

- A. You and Forsyth, Cubbage & Associates, P.C. mutually agree to the terms of representation, or after a separate document called an Engagement Letter is signed and a copy is provided to you;**
- B. Forsyth, Cubbage & Associates, P.C. declines representation, or;**
- C. You decide not to use the services of Forsyth, Cubbage & Associates, P.C.**

***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: _____

City, State, Zip: _____

Home Phone: _____

Other phone number we may contact you: _____

Email address: _____

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

Opposing parties (if any)

Party _____ Relationship _____

Party _____ Relationship _____

Party _____ Relationship _____

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

Party _____ Relationship _____

Party _____ Relationship _____

Party _____ Relationship _____

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

1. _____
2. _____
3. _____

Did you bring all pertinent documents with you today? Yes No

(NOTE: Any documents you supply that are important to your matter may be photocopied and/or scanned, 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 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? Yes No

If No – Why didn't you hire their services?

Have you ever been represented by an attorney before? Yes No

If Yes – Please state the circumstances

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

Check Cash

Marital Status: Married Single Divorced Widowed Separated

Drivers License # _____ Social Security # _____

Are you known by any other names? Yes No

If yes name(s) _____

(A fictitious name, a nickname, a former name, your maiden name etc.)

Where are you employed?

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

If your mail is returned as undeliverable or 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. (____) _____

State & Zip _____

How did you learn of our office A friend Yellow Pages Bar Referral

Our Web Page <http://www.fca-law.com> Current or Former Client Other

If by referral of a current or former client, may we mention the referral to them? Yes No

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 an Engagement Letter. The Engagement Letter will set forth the terms and conditions of representation.

If the Attorney is willing to represent you and you do not promptly sign an Engagement Letter, 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.

NOTICE: Forsyth, Cabbage & Associates, P.C. does not represent you with regard to the matters set forth by you herein in this information sheet or discussed during your consultation unless and until, both you and the Attorney execute a written Engagement Letter.

If the Attorney does not agree to represent you, this means (1) not representing you with regard to the matter set forth by you on this information sheet and (2) any other matters you may have discussed with the Attorney during your consultation. If your legal problem(s) involve a potential lawsuit, it is important that you realize a lawsuit must be filed within a certain period of time called a Statute of Limitations. Therefore, the Attorney strongly urges you to immediately consult with another attorney to protect your rights. The Attorney's decision not to represent you should not be taken by you as an expression regarding the merits of your case.

Your signature acknowledges only that you received a copy of this completed information sheet and does not mean you have hired the Attorney.

SIGNATURE _____ DATE ____/____/ ____

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***This portion to be completed by the Attorney***

- Will represent (see New Case Memo and Engagement Letter attached)
- Will investigate and report (Schedule a follow-up conference for \_\_\_\_ days)
- Representation declined – Letter of declining engagement will be sent .
- Party "will think about it" and agreed to get back with us – No action to be taken and party was so informed.
- Client declined Representation at this time.

Interviewed by \_\_\_\_\_ this \_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_

NOTES:

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