



Law Offices of Damaris G. Claude

Estate Planning and Elder Law

INITIAL CONSULTATION FORM

(Must be signed prior to initial consult with attorney)

Date: _____ Referred by: _____

Name: _____

Social Security No: _____

Spouse's Name: _____

Social Security No: _____

Employer: _____

Address: _____

Home Phone: _____ Cell Phone: _____

Office Phone: _____ Fax: _____

Email: _____

How do you prefer to be contacted? Home/Cell/Office/Email

Reason for consultation: _____

Have you consulted another attorney regarding this matter? Y/N

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 Agreement. The Retainer Agreement will set forth the terms and conditions of representation. If the Attorney is willing to represent you and you decide not to sign a Retainer Agreement 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. **NOTICE: This office 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 Retainer Agreement.** If the Attorney does not agree to represent you, this includes representation with respect to the matter set forth by you on this information sheet, as well as any other matters you may discuss with the Attorney during your consultation. 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.** You will not be charged a fee for consulting with the attorney with respect to your Estate Planning, however, consultation on matters *other than* Estate Planning, are fee based. You will be notified in advance of your consult whether or not you will incur a fee for the initial consultation, and how much the fee will be.

Client

Client