**LEGAL CLIENT INTAKE FORM TEMPLATE **

|  |  |  |  |
| --- | --- | --- | --- |
| **DATE** |  |  | **TENDING ASSOCIATE** |
|  |  |
| **IS THIS A PREVIOUS CLIENT?** |  | **REFERRED BY** |  |  |
|  |  |
| CLIENT ONBOARD INFORMATION |
| **NAME** |  |  |  |
| **CELL PHONE** |  | **HOME ADDRESS** |  |
| **ALT. PHONE** |  |  |  |
| **EMAIL** |  |  |  |
| **SOCIAL SECURITY NUMBER** |  | **WORK ADDRESS** |  |
| **DATE OF BIRTH** |  |  |  |
| LEGAL CASE OVERVIEW |  |  |  |  |
|  |
| VIOLATION INFORMATION |  |  |  |  |
|  |
| NOTES |  |  |  |  |  |
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| PAYMENT INFORMATION |  |  |  |  |
| **PAYMENT TO** |  | **PAYMENT DATE** |  |
| **RECEIPT NUMBER** |  | **AMOUNT PAID** |  |
| **PAYMENT METHOD** |  |
| **RECEIVED FROM** |   | **RECEIVED BY** |   |
| **ACCOUNT INFO** | **PAYMENT PERIOD** |
| **ACCT BALANCE** | **THIS PAYMENT** | **BALANCE DUE** | **FROM** |  |
|   |   |   | **THROUGH** |  |
| **PAYMENT FOR** | **ADDITIONAL INFO** |  |
|   | **THANK YOU** |

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