**LEGAL CLIENT INTAKE FORM TEMPLATE [](https://bit.ly/2Pu7tYu)**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| **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 |  |  |  |  |  |
| UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  YES  UNKNOWN  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO  NO | | | | | |
|  |  |  |  |  |  |
| 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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