

**PAGE 1 TO BE COMPLETED BY STAFF PRIOR TO CALLER COMING TO OFFICE SO THAT THE PARTY ONLY HAS TO CONFIRM THE ACCURACY OF THE CONTENTS:**

**THE RAGAN LAW FIRM, P.A.**  
**NEW CLIENT INTAKE INFORMATION AND NOTICE OF NON-REPRESENTATION**

Date: \_\_\_\_\_

**PLEASE CONFIRM THAT THE FOLLOWING INFORMATION COMPLETED BY OUR STAFF IS CORRECT. MAKE CHANGES AS APPROPRIATE:**

Your Name \_\_\_\_\_ Spouse's Name \_\_\_\_\_

Years married \_\_\_\_\_ Children? Yes / No. Name \_\_\_\_\_ DOB \_\_\_\_\_  
Name \_\_\_\_\_ DOB \_\_\_\_\_

**Address to send mail to:** \_\_\_\_\_

**Contact telephone numbers and e-mail addresses:** \_\_\_\_\_

A name and telephone number of friend or relative who we could contact to leave a message or have you call us back: \_\_\_\_\_

Your home address: \_\_\_\_\_  
\_\_\_\_own \_\_\_\_rent \_\_\_\_ how long at this address? Cost or value, if known \$ \_\_\_\_\_  
Home telephone \_\_\_\_\_ Work telephone \_\_\_\_\_ E-mail \_\_\_\_\_

Occupation / Employment \_\_\_\_\_ Annual Income \_\_\_\_\_

Spouse's Occupation and Employment \_\_\_\_\_ Annual Income \_\_\_\_\_

Referred by \_\_\_\_\_

How caller will pay \_\_\_\_\_ Available credit on cc \_\_\_\_\_

Name of party who will be paying fees  
and relationship to caller: \_\_\_\_\_

Emergency matter that requires immediate assistance:  
\_\_\_\_\_

Does your spouse have a lawyer? Yes / No. Name \_\_\_\_\_

Have you been served with Court papers? Yes / No. When? \_\_\_\_\_

**PLEASE READ AND ANSWER THE FOLLOWING:**

The following emergency matters require immediate attention: \_\_\_\_\_

The five most important issues are **(if you have a separate list already compiled, please attach):**

Mine:

I think my spouse's would be:

a. \_\_\_\_\_

a. \_\_\_\_\_

b. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_

e. \_\_\_\_\_

**(If you have a separate list already compiled, please attach.)**

What I want:

What I think my spouse wants:

a. \_\_\_\_\_

a. \_\_\_\_\_

b. \_\_\_\_\_

b. \_\_\_\_\_

c. \_\_\_\_\_

c. \_\_\_\_\_

d. \_\_\_\_\_

d. \_\_\_\_\_

e. \_\_\_\_\_

e. \_\_\_\_\_

4. The ideal outcome to me is \_\_\_\_\_

5. I have brought all court papers and other papers that I have been served with by my spouse.  
Yes / No. If no, explain \_\_\_\_\_

6. Any financial records I have in my possession I have brought with me today?  
Yes / No. If no, explain \_\_\_\_\_

7. I have brought a list of financial documents and where they are located, to the best of my knowledge? Yes / No. If no, explain \_\_\_\_\_

8. Physicians and therapists with whom I have consulted within the last year:

Name \_\_\_\_\_ Address \_\_\_\_\_ Telephone \_\_\_\_\_  
Specialty \_\_\_\_\_ Why consulted? \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_ Telephone \_\_\_\_\_  
Specialty \_\_\_\_\_ Why consulted? \_\_\_\_\_

Name \_\_\_\_\_ Address \_\_\_\_\_ Telephone \_\_\_\_\_  
Specialty \_\_\_\_\_ Why consulted? \_\_\_\_\_

9. Medications I am currently taking:

Name \_\_\_\_\_ Prescribed for \_\_\_\_\_ How long? \_\_\_\_\_  
Name \_\_\_\_\_ Prescribed for \_\_\_\_\_ How long? \_\_\_\_\_

10. Other lawyers with whom I have spoken directly to or have met with are:

Name \_\_\_\_\_ When? \_\_\_\_\_  
Name \_\_\_\_\_ When? \_\_\_\_\_

11. Previous lawyer(s) I have hired are:

Name \_\_\_\_\_ When? \_\_\_\_\_  
Name \_\_\_\_\_ When? \_\_\_\_\_

12. If so, is the case set for trial? Yes / No. When? \_\_\_\_\_

Are hearings set? Yes / No. When? \_\_\_\_\_

13. Referred by \_\_\_\_\_

14. Any other immediate concerns or issues you would like to specifically address:

\_\_\_\_\_  
\_\_\_\_\_

I understand that I am not a client of this office at this time and will not be a client of this office, and the lawyer(s) cannot provide legal advice to me, until there is a written retainer agreement executed by myself and this law office.

Signature \_\_\_\_\_