

# Peart Law Office, P.A.

Peart Law Office, P.A.  
10150 Highland Manor Drive  
Suite 200  
Tampa, Florida 33610

## INITIAL CLIENT CONSULTATION INTERVIEW 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 therefore 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.

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

- A. You and the Attorney mutually agree to the terms of representation;**
- B. The Attorney declines representation, or**
- C. You decide not to use the services of the Attorney.**

**Note: The following questions will help us understand the reason for your visit today. Your responses will be held in strict confidence.**

Name \_\_\_\_\_  
Last First Middle

Address \_\_\_\_\_

City \_\_\_\_\_ State & Zip \_\_\_\_\_

Phone No. (\_\_\_\_) \_\_\_\_\_ Cell Phone (\_\_\_\_) \_\_\_\_\_

Work Phone (\_\_\_\_) \_\_\_\_\_ E-Mail \_\_\_\_\_

Marital Status:  Married  Single  Divorced  Widowed  Separated

Name of Spouse: \_\_\_\_\_

Driver's License # \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Are you known by any other names?  Yes  No

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

If yes what name(s) \_\_\_\_\_

Where are you employed? \_\_\_\_\_

May we contact you there?  Yes  No Phone No. (\_\_\_\_) \_\_\_\_\_

Please provide the name of someone (friend or relative) that will always be able to contact you.

Name \_\_\_\_\_ Relationship \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State & Zip \_\_\_\_\_ Phone No. (\_\_\_\_) \_\_\_\_\_

Telephone (813) 314-2475

Facsimile: (888) 707-3744

E-mail: peartlaw@verizon.net

# Peart Law Office, P.A.

Peart Law Office, P.A.  
10150 Highland Manor Drive  
Suite 200  
Tampa, Florida 33610

Please explain what you need advice about or assistance with today. Be as detailed as possible so that your case/matter may be sufficiently evaluated:

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

---

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

Party\_\_\_\_\_ Relationship\_\_\_\_\_

Party\_\_\_\_\_ Relationship\_\_\_\_\_

Party\_\_\_\_\_ Relationship\_\_\_\_\_

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

- (1)\_\_\_\_\_
- (2)\_\_\_\_\_
- (3)\_\_\_\_\_

*(NOTE: Any documents you supply that are important to your matter will be photocopied, with your permission, and your originals returned to you at the conclusion of the initial interview.)*

Is this the first attorney you have consulted regarding this matter?      Yes                  No

If No - Why didn't you hire his/her services? \_\_\_\_\_

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

If Yes - Please state the circumstances: \_\_\_\_\_

Telephone (813) 314-2475                  Facsimile: (888) 707-3744                  E-mail: peartlaw@verizon.net

# Peart Law Office, P.A.

Peart Law Office, P.A.  
10150 Highland Manor Drive  
Suite 200  
Tampa, Florida 33610

How did you learn of our office?

- |                                       |                                          |                                          |
|---------------------------------------|------------------------------------------|------------------------------------------|
| <input type="checkbox"/> PeartLaw.com | <input type="checkbox"/> Lawyers.com     | <input type="checkbox"/> Yellowpages.com |
| <input type="checkbox"/> Google.com   | <input type="checkbox"/> FreeAdvice.com  | <input type="checkbox"/> Florida Bar     |
| <input type="checkbox"/> Yahoo.com    | <input type="checkbox"/> Nolo.com        | <input type="checkbox"/> Client Referral |
| <input type="checkbox"/> Bing.com     | <input type="checkbox"/> HG.com          | <input type="checkbox"/> Yelp.com        |
| <input type="checkbox"/> Findlaw.com  | <input type="checkbox"/> Superpages.com  | <input type="checkbox"/> Avvo.com        |
| <input type="checkbox"/> Justia.com   | <input type="checkbox"/> Switchboard.com | <input type="checkbox"/> Other: _____    |

## 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 Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation.

If the Attorney is willing to represent you and you decide not to sign an Agreement of Representation 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 Agreement for Representation.**

If the Attorney does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, or any other matters you may discuss 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 reviewed this information and does not mean you have hired the Attorney.**

SIGNATURE \_\_\_\_\_ Date \_\_\_\_/\_\_\_\_/\_\_\_\_  
Telephone (813) 314-2475 Facsimile: (888) 707-3744 E-mail: peartlaw@verizon.net