Legal Client Intake and Case Assessment Sheet

Instructions: Complete all sections thoroughly. This document is intended for internal physical archiving and print reference.

1. General Intake Information

Intake Date:		Case/File Number:	
Intake Officer:		Referred By:	

2. Client Personal Information

First Name:		Last Name:	
Date of Birth:		SSN / National ID:	
Phone Number:		Email Address:	
Street Address:			
City:		State / Zip:	
Employer Name:		Job Title:	

3. Adverse / Opposing Party Details

Opposing Party Name:		Relationship to Client:	
Opposing Counsel (if any):		Conflict of Interest Check (Pass/Fail):	

4. Case Details and Legal Issues

Practice Area / Case Type:		Date of Incident / Occurrence:	
Statute of Limitations Deadline:		Jurisdiction / Court:	
Brief Summary of Facts (Line 1):			
Brief Summary of Facts (Line 2):			
Brief Summary of Facts (Line 3):			

5. Preliminary Merits Assessment

Key Strengths of Case:	
Key Weaknesses / Risks:	
Critical Evidence Available:	

6. Financial & Fee Arrangements

Fee Type (Hourly/Contingency/Flat):		Retainer Amount Required:	
Estimated Hourly Rate:		Third-Party Payer (if applicable):	

7. Office Action & Disposition

Disposition (Accepted / Declined / Referred):		Assigned Attorney:	

Immediate Next Step 1:			
Immediate Next Step 2:			
Interviewer Signature:		Date Signed:	