

**OBERMAN LAW FIRM
NEW CLIENT**

Today's Date: _____

Client's full name: _____

Place of Birth: City: _____ County: _____ State: _____ Country: _____

Date of Birth: _____ Social Security No. _____

Driver's License Number: _____ State: _____

Street Address: _____

City: _____ County: _____ State: _____ Zip: _____

Email Address: _____ Cell Phone: _____

____ I authorize emails concerning my case ____ I authorize emails of general interest from Oberman Law

____ I authorize a follow up call concerning my consultation. If yes, best contact number: _____

Spouse's full name: _____ Maiden Name: _____

Date of Birth: _____ Social Security No. _____

Home phone: _____ Client work: _____ Spouse work: _____

Client's employer: _____

Address of Employer: _____ City: _____ State: _____ Zip: _____

Spouse's employer: _____

PERSON FINANCIALLY RESPONSIBLE: Name _____ DOB: _____

Address: _____ City: _____ State: _____ Zip: _____

Phone: _____ Social Security No.: _____ Drivers License No.: _____ State _____

EMERGENCY CONTACT INFORMATION: Name _____

Address: _____ City: _____ State: _____ Zip: _____

Home phone: _____ Work Phone: _____

What legal action(s) were you involved in, if any? _____

Purpose of visit: _____

HOW WERE YOU REFERRED TO US? (Circle one): I am a Previous Client Office Sign Seminar

Friend: Name of Friend: _____ Oberman Law employee: Name _____

Attorney: Name: _____ Ad: _____ Other: _____

OFFICE USE ONLY:

Primary Attorney: _____ Hour: _____

Attorney 2: _____ Hour: _____

Attorney 3: _____ Hour: _____

Paralegal: _____ Hour: _____

Fee Type:

C – contingency

F – fixed

R- retainer

T- time/expense

Billing Frequency:

M – monthly

Q – quarterly

S – semi-annually

O – other

Checklist:

Conflicts Check: _____ Fee Contract: _____ First Appearance due: _____ (if applicable)

Statute of Limitations Deadline: _____

Other deadlines: _____

File Review Frequency: _____

Instructions: _____

Initials:

Date:

Client sheet prepared by: _____

Conflicts checked by: _____

Deadlines docketed by: _____

CASE TYPE:

- Estate Planning
- Estate Administration
- Wills
- Employment Law
- Foreclosures
- General Corporate Matters
- Patents

- Contracts /Litigation
- Other Litigation
- Family Law
- Criminal
- Limited Liability Company
- Trademarks

- Collections
- Other business
- Guardianship
- Incorporation
- Personal Injury
- Tax-business