



## Intake Form

Reason for Consultation (i.e. divorce, separation, prenuptial agreement, general consultation, second opinion): \_\_\_\_\_

Are you here about a contested or uncontested divorce?

- uncontested (I have spoken with my spouse and we are in agreement on all of the terms of the divorce)
- contested
- not sure

Have you discussed this matter with your spouse? (Y/N) \_\_\_\_\_

How did you find our law firm? (check all that apply)

- Google Search
- Website
- Facebook
- Referral from past client/friend
- Referral from another attorney
- Other

DESCRIBE WHAT YOU WOULD LIKE TO ACCOMPLISH DURING YOUR CONSULTATION:

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**Your Information**

Full Legal Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Citizenship: \_\_\_\_\_ SSN number: \_\_\_\_\_

Surname at Birth: \_\_\_\_\_ Surname Before Marriage: \_\_\_\_\_

Current Home Address: \_\_\_\_\_

Since When? \_\_\_\_\_

Current Mailing Address (if different from home address):

\_\_\_\_\_

Home Tel.: \_\_\_\_\_ Work Tel.: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Preferred Method of Communication: \_\_\_\_\_

Divorced Before? \_\_\_\_\_ Place and Date: \_\_\_\_\_

Job Title: \_\_\_\_\_

Current employer and address: \_\_\_\_\_

\_\_\_\_\_

Current annual income from employment: \$\_\_\_\_\_

Income from other sources: \$\_\_\_\_\_ (break down other sources)

Current or Previous Family Lawyer: \_\_\_\_\_

**Spouse Information**

Full Legal Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Place of Birth: \_\_\_\_\_

Citizenship: \_\_\_\_\_ SIN number: \_\_\_\_\_

Surname at Birth: \_\_\_\_\_ Surname Before Marriage: \_\_\_\_\_

Current Home Address: \_\_\_\_\_

Since When? \_\_\_\_\_

Current Mailing Address (if different from home address):

\_\_\_\_\_

Home Tel: \_\_\_\_\_ Work Tel: \_\_\_\_\_

Cell: \_\_\_\_\_ Fax: \_\_\_\_\_

E-mail: \_\_\_\_\_

Divorced Before? \_\_\_\_\_ Place and Date: \_\_\_\_\_

Job Title: \_\_\_\_\_

Current employer and address: \_\_\_\_\_

\_\_\_\_\_

Current annual income from employment: \$ \_\_\_\_\_

Income from other sources: \$ \_\_\_\_\_ (break down other sources)

Spouse's lawyer and contact information: \_\_\_\_\_

\_\_\_\_\_

**Marital Information**

Date of Marriage: \_\_\_\_\_

Place of Marriage (City, State, Country): \_\_\_\_\_

Civil or Religious Ceremony: \_\_\_\_\_

Date of Separation: \_\_\_\_\_

**Children**

Name	Date of Birth	Living With	Grade/School

**Children's Expenses**

Medical/Dental/Orthodontic: \_\_\_\_\_  
\_\_\_\_\_

Private School/Tutoring/Educational Expenses: \_\_\_\_\_  
\_\_\_\_\_

Post-secondary Educational Expenses: \_\_\_\_\_  
\_\_\_\_\_

Daycare/Child Care: \_\_\_\_\_  
\_\_\_\_\_

Extracurricular Activities: \_\_\_\_\_  
\_\_\_\_\_

Other Expenses: \_\_\_\_\_  
\_\_\_\_\_

Have either you, your spouse, or children been in a court case before? Yes No

Have you and your spouse made a written agreement dealing with any matter involved in this case? Yes No

If client or spouse is stay-at-home parent, please give relevant dates:  
\_\_\_\_\_

Do you have any safety concerns for yourself or your children? Yes No

Have the police been called to the matrimonial home and does either spouse have a criminal record? Yes No

Who provides health insurance for the children? \_\_\_\_\_

**Matrimonial Home**

**First:**

Address: \_\_\_\_\_

Name(s) on Title: \_\_\_\_\_

Value: \$ \_\_\_\_\_ Mortgage: \$ \_\_\_\_\_

**Second:**

Address: \_\_\_\_\_

Name(s) on Title: \_\_\_\_\_

Value: \$ \_\_\_\_\_ Mortgage: \$ \_\_\_\_\_

**Excluded Property**

Received by client (during or after marriage):

\_\_\_\_\_

Received by client's spouse (during or after marriage):

\_\_\_\_\_

**Retirement**

Do you have an employer provided pension, deferred compensation or other retirement plan? (Y/N) \_\_\_\_ Which type? \_\_\_\_\_

Does your spouse have an employer provided pension, deferred compensation or other retirement plan? (Y/N) \_\_\_\_ Which type? \_\_\_\_\_

**Assets**

Which of the following do you have? (Check all that apply)

<b>JOINT</b>		<b>INDIVIDUAL</b>	
Checking		Checking	
Savings		Savings	
IRAs		IRAs	
Brokerage		Brokerage	
Real Estate		Real Estate	
Business Interest		Business Interest	
Stocks		Stocks	

**DO NOT GO BEYOND THIS POINT. STOP HERE.**

## EVALUATION

### Uncontested Divorce screening

Do parties consent to divorce?	
Is there an agreement on division of property?	
Is there an agreement on custody?	
Is there an agreement on visitation?	
Is there an agreement on child support?	
Is there an agreement on spousal support?	
Will we need to serve the defendant?	
Will a written stipulation be required?	
Is our client seeking expedited service?	
Will a QDRO be required?	

### Contested Divorce screening

Custody issues?	
Visitation issues?	
Property division issues?	
Pension/Retirement issues?	
Child support issues?	
Spousal Support?	
Domestic Violence?	
Emergency issues?	
Other	

### Family Court Case screening

Custody matter	
Visitation matter	
Family offense petition	
New support matter	
Modification of support	
Enforcement of support	

**ACTION STEPS**

<b>Retainer signed</b>	
<b>Welcome folder provided to client</b>	
<b>Smokeball file opened</b>	
<b>Intake completed</b>	
<b>Family Law Software link sent</b>	
<b>Matter commenced</b>	