NEW CLIENT INFORMATION SHEET WITH DISCLAIMER

The new client information sheet should be completed by every new client that comes into the office. It will enable the office to have all the pertinent information relating to the client written in the client's own hand. Any other required information sheet (such as information sheets relating to a domestic relations case, probate of an estate, preparation of a will, etc.) should also be given to the client for completion while waiting for the attorney. The client then takes the completed information sheet(s) into the attorney's office, and the attorney does not have to waste valuable time asking the client these routine questions. This information sheet includes a disclaimer clarifying that the attorney is not obligated to provide services to the client until the client and attorney mutually agree to the terms of representation.

By tracking "Why you chose our office," the lawyer can determine what means of advertising is working. Then the means of advertising that is not bringing in clients can be scaled back and what is working can be expanded.

The new client information sheet (see attached sample) has space at the bottom for the attorney to fill in the appropriate docket control information. It also has a space to be checked when it has been determined there is no conflict of interest involved. No file should be opened until conflicts have been checked.

This sheet should be routed to the person in charge of the docket for entry into the system and then placed in the client's file for reference.

IMPORTANT NOTICES

This material is provided for informational purposes only and does not establish, report, or create the standard of care for attorneys in Oregon, nor does it represent a complete analysis of the topics presented. Readers should conduct their own appropriate legal research. The information presented does not represent legal advice. This information may not be republished, sold, or used in any other form without the written consent of the Oregon State Bar Professional Liability Fund, except that permission is granted for Oregon lawyers to use and modify these materials for use in their own practices.

NEW CLIENT INFORMATION SHEET

The purpose of an initial consultation is to assess whether my legal services can be of use to you and, if so, to discuss the fees for my services. It may not be possible to make that determination given the time allotted for our meeting or with the information that you can provide. Following our consultation, you may decide not to retain me or I may decline to represent you. For me to act as your attorney, you and I must agree in writing to the terms of my representation.

TODAY'S DATE____________________________

Client's Full Name____ SS#________________________

Client's Former Name/ Other Names Used____

Spouse's/Partner's Full Name____ SS#________________________

Spouse's/Partner's Former Name/ Other Names Used____

Street Address____

City/State___________________________ Zip_________________ E-mail Address ____________________________

Telephone (Home)___________________ Client Work________________ Spouse/Partner Work________________

Client's Employer__________________________________ Spouse's/Partner's Employer________________________

Emergency Contacts:

Name_____________________________________ Relationship________________ Telephone___________________

Name_____________________________________ Relationship________________ Telephone___________________

Why You Chose Our Office____

Conference With Attorney Regarding:

FOR OFFICE USE ONLY

Fee arrangement:
Billing arrangement:

DOCKET CONTROL	
Statute of Limitations Deadline	
Tort Claims Act Notice Due	
First Appearance Due	
Other Deadlines	
File Review Frequency	
INSTRUCTIONS:	

CONFLICT CONTROL	
NAME	RELATIONSHIP

File opened by_______________ Conflicts checked by________________ Deadlines docketed by_________________
Engagement letter sent by____ Date:_________________________________