



Initial Client Conference Interview Form

(FAX TO: 727-789-4002)

Law Offices Of Jeffrey A. Herzog, P.A.

The purpose of an initial conference is for the Attorney to advise you, the *prospective* client what, if anything, may be done for you, how to go about it, and what the 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 conference or with the (information or documents) that you may be able to provide at the initial conference. The cost of this minimum fee initial conference is \$500.00. That fee is non refundable but portions can be applied toward any future retainer. The attorneys of this Firm work at \$275 per hour. Thank you for coming to The Law Offices of Jeffrey A. Herzog, P.A.

One of three outcomes is possible following your conference:

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

Note: The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name: _____
(Last) (First) (Middle or Maiden)

Address: _____
(Number) (Street) (City) (State) (Zip)

Home Telephone: _____ Cellular Telephone: _____

Briefly explain what you need advice about or assistance with today:

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

Party _____ Relationship: _____

Party _____ Relationship: _____

Party _____ Relationship: _____

On the lines below, list the documents and/or papers that you think may help us 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 interview if needed.)

Ideally, if things turn out precisely the way you want, what would the outcome be?

Knowing that there are no guarantees, what can you accept?

Please classify your urgency in concluding this matter (check one).

- Critical – personal safety or continuation of business depends on it.
- Very Important – severe hardship. Personal or financial inconvenience of matter is not resolved quickly.
- Important – Matter interferes with business or financial stability.
- Needs to be done, but no immediate hardship in the interim.
- Just thought I'd see if it was worth pursuing, but I'm not counting on anything.
- Just wanted to what my rights are, and I'll then let you know after I think about it.

If the matter involves payment to you of money you feel you are owed, how long can you wait before getting paid? _____ (number of days/weeks/months/years)

Are we the first attorneys you have consulted regarding this matter? Yes No

If No – Why didn't you hire their services? _____

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

If Yes – Please state the circumstances: _____

How will you pay for attorney's fees in this matter?

Check today Cash today (If paying with cash or check, the Firm will still need a card on file)

Credit Card Credit Card Number: _____ Exp. Date: _____

Billing Address of CC: _____ Zip Code _____

Marital Status: Married Single Divorced Widowed Separated

Driver's License # _____ Social Security # _____ - _____ - _____

Are you known by any other names? Yes No

If Yes, what name(s)? _____

Employer: _____

May we contact you there? Yes No Telephone Number: _____

If your mail is returned as undeliverable or your telephone service terminated, please provide the name of someone (friend or relative) you believe will always know how to contact you.

Name: _____ Relationship: _____

Address: _____
(Number) (Street) (City) (State) (Zip)

Home Telephone: _____ Cellular Telephone: _____

How did you learn about our office? () A friend () Yellow Pages () Bar Referral
() Our Web Page () Current or Former Client () 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 conference, 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 matter you may discuss with the Attorney during your conference. 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 the 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 be taken by you as an expression regarding the merits of your case.

Your signature acknowledges only that you received a copy of this completed information sheet and does not mean that you hired the Attorney.

SIGNATURE: _____ Date: ____/____/____

