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**NEW CLIENT INTAKE QUESTIONNAIRE**

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**FULL LEGAL NAME/S**  
**(including middle name or initial)**

**PREFERRED**  
**PHONE NUMBER:**

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**MARITAL STATUS**

- Married
- Divorced
- Widowed
- Single (never married)
- Other, please describe:

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**EMAIL:**

I DO NOT wish to have newsletters and or related company updates

**PREFERRED CONTACT METHOD FOR ALL CASE**  
**RELATED CORRESPONDENCE:**

EMAIL  PHONE CALL  TEXT

**HOW DID YOU HEAR ABOUT US?**

**ADDRESS**  
**(including County and PO Box if applicable):**

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- Website
- Personal, friend relative
- Social Media
- Outside organization
- Other, please describe:

**FAMILY**

Any Children?  Y  N

If yes, please specify amount:

**PURPOSE OF LEGAL INQUIRY:**  
**(I.e. Will, POAs, Guardianship, Life Care, etc)**  
**Please explain:**

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