

# INNS OF COURT TEAM 6

## CASE EVALUATION QUESTIONNAIRE

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**Case Name:**

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**Case Caption:**

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**Client Contact:**

*Full Name*  
*Home/Business Address*  
*Email Address*  
*Telephone Number*  
*Facsimile Number*

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**Opposing Party:**

*Full Name*  
*Home/Business Address*  
*Email Address*  
*Telephone Number*  
*Facsimile Number*

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**Opposing Attorney Contact:**

*Attorney's Name*  
*Paralegal's Name*  
*Law Firm Name*  
*Address*  
*Email Address(es)*  
*Telephone Number(s)*  
*Facsimile Number(s)*

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**Case/Docket No.:**

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**File No.:**

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**Attorney(s) Assigned to Case:**

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**Staff Assigned to Case:**

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**County/Jurisdiction:**

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**Judge:**

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**Status:**

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**Cause(s) of Action:**

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**Defense(s)**

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**Counterclaim(s)**

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**Elements of Count/Defense:**

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**Case Summary:**

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**Case Strategy:**

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**Statute of Limitations:**

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**Deadlines:**

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**To Do List:**

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**Legal Issues:**

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**Legal Research:**

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**Conclusions on Legal Issues:**

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**Timeline of Events:**

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**Docket History:**

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# INNS OF COURT TEAM 6

## CLIENT INTAKE QUESTIONNAIRE

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1. Full Name: \_\_\_\_\_
2. Spouse's Name: \_\_\_\_\_
3. Telephone Number(s): \_\_\_\_\_
4. Facsimile Number(s): \_\_\_\_\_
5. Email Address: \_\_\_\_\_
6. Home Address: \_\_\_\_\_
7. Employer/Company: \_\_\_\_\_
8. Business Address: \_\_\_\_\_
9. Send invoices to:       *Business Address*       *Home Address*
10. Referred by: \_\_\_\_\_
11. What are the names of any other lawyers you have consulted regarding this case?  
\_\_\_\_\_  
\_\_\_\_\_
12. Briefly explain what you may need advice about or assistance with today.  
\_\_\_\_\_  
\_\_\_\_\_

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13. Potential legal issues/cause(s) of action:

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14. Who are the parties involved? (Examples: a friend, an employer, a neighbor, signor of a contract, etc. This should include parties on either side of your issue)

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15. Identify any witnesses or people with knowledge of the facts of this case.

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16. Describe any papers you been served with concerning this case.

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(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 initial interview.)

17. Describe any documents you have relating to this case or may be helpful to understanding the issues of the case.

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18. Do you have access to your files or papers relating to this case?

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19. Describe any statements you have made to anyone concerning this case.

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

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

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22. 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, if matter is not resolved quickly.

**Important:** Matter interferes with business or personal financial stability.

**Needs to be done:** No immediate hardship in the interim.

**Just thought I would see if it was worth pursuing:** I am not counting on anything.

**Just curious:** I will then let you know if I want to pursue this, after I think about it.

23. If the matter involves payment of money you feel you are owed, how long can you wait before not getting paid?

**Days**    **Weeks**    **Months**    **Years**

24. How familiar are you with the legal process?

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25. Have you ever been involved with a lawsuit before? If yes, please describe the circumstances and the outcome.

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26. Case No. (if any): \_\_\_\_\_

27. Fee Agreement: \_\_\_\_\_

28. Engagement Letter: \_\_\_\_\_

29. Conflict Check: \_\_\_\_\_

30. Statute of Limitations: \_\_\_\_\_

31. Deadline(s): \_\_\_\_\_

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

*Check today*

*Cash today*

*Contingency Fee*

*On Account*

*Credit Card*