

Date: \_\_\_\_\_  Mark this box if you have previously been a client of this firm.

**Initial Consultation Fee:** There is a fee of \$100.00 for the first half hour of the initial meeting, due at the time of your appointment. Regular hourly charges apply thereafter.

Name: \_\_\_\_\_

Telephone: \_\_\_\_\_  
(Home)

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

\_\_\_\_\_  Ok to text?\*

(Mobile)

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

Billing Address: (If different from mailing address)

Employer: \_\_\_\_\_

\_\_\_\_\_

Work Phone: \_\_\_\_\_

\_\_\_\_\_

Former Last Names: \_\_\_\_\_

Email: \_\_\_\_\_

Please provide us with your email address so that we may communicate with you via email. (If we cannot communicate with you via email, you may be charged a \$20.00 postage fee)

SS#: \_\_\_\_\_ \*Our office may need your SS#, depending on the type of matter you are here for. Please know that we ask for your SS# for our use only, and we will do our best to protect your confidential information.

Spouse: \_\_\_\_\_

Phone: \_\_\_\_\_

Today's visit is regarding:  Business/Corporate Law  Estate Planning  Real Estate  Other - please describe here: \_\_\_\_\_

Possible opponent(s) in this matter: \_\_\_\_\_

Other people with an interest in this legal matter, property, or issue: (i.e. co-owner of property, officers of a small corporation, etc.) \_\_\_\_\_

Emergency Contacts: \_\_\_\_\_ ( \_\_\_\_\_ ) \_\_\_\_\_  
(Name & Relationship) (Best Contact #)

Referred by :  Website  Lawyer Referral Service  Previous John Wittwer Client  Morley Thomas Law  
 Phone Book  Friend  Relative  Internet search  Referral/Other: \_\_\_\_\_

I hereby agree and consent that **The Morley Thomas Law Firm** may destroy or otherwise dispose of my file ten (10) years after the file is closed by **The Morley Thomas Law Firm**.

**For Office Use Only:** Clio Matter#: \_\_\_\_\_ File Type : \_\_\_\_\_ (Trust, Probate, etc.)  
Retainer Quoted: \$ \_\_\_\_\_ Filing Fee: \$ \_\_\_\_\_ File Created: \_\_\_\_\_ Initial Ltr: \_\_\_\_\_ dictated  
 **John (Trè) Kennedy**  **John Wittwer**