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## Client Intake Form

Welcome to Stone Law, LLC. Please provide as much information as possible, print neatly.

Date: _____		Home Phone: _____	
Client: _____ <i>Full Legal Name</i>	Co-Client: _____ <i>Full Legal Name</i>		
Birthdate: _____	Birthdate: _____		
Physical Address: _____ <i>Street</i>	Mailing Address: _____ <i>Street</i>		
_____	_____		
_____	_____		
_____	_____		
Work or Cell Phone: _____	Work or Cell Phone: _____		
Email: _____	Email: _____		

### Reason for visit:

- General Consultation
- Business
- Estate Planning
- Probate/Trust administration
- Elder Law concern
- Other

### How did you hear about us?

- Personal Referral (from another attorney, an agency, a family member, or a friend): \_\_\_\_\_
- Web: \_\_\_\_\_
- Print: \_\_\_\_\_
- Radio: \_\_\_\_\_
- Other: \_\_\_\_\_

Please list names of the other parties involved, if any. (ie: case workers, attorneys, the opposing side etc.)

_____	_____
_____	_____
_____	_____

Have you ever consulted, retained, or been associated with a legal matter involving Marc Summers or Andrew Stone? (If yes, please explain and let us know which attorney.)

No     Yes \_\_\_\_\_

\_\_\_\_\_ **Initial.** Client understands the participation of a third-party in any communication with the attorney, waives the attorney-client privilege, unless the presence of the third-party is objectively necessary to facilitate the confidential communication with and to the client.

For our office use only.

APS: Conflict?  Yes  No

MES: Conflict?  Yes  No