

Prospective New Client Intake Sheet

Welcome to Burke & Casserly, P.C. Meeting Date: _____

Thank you for considering Burke & Casserly, P.C. for your planning needs. Should decide to retain Burke & Casserly, P.C. to represent you in your legal matter(s), we would appreciate you taking the time to provide us with the following information to ensure accuracy of our records.

We are so grateful for our referral sources and would like to extend our gratitude. Please indicate below how you heard about our firm (seminar, internet, existing client, word-of-mouth (and if so, by whom?))

Name of Client(s) <i>(Person we would be representing)</i>	Primary Contact Person <i>(if other than client)</i>
Client's Home / Mailing Address	Primary Contact's Mailing Address
Client's Phone:	Primary Contact's Phone:
Business Address and Phone <i>(if applicable)</i>	Business Address and Phone <i>(if applicable)</i>
Client's Email Address(s)	Primary Contact Email Address(s)
How were you referred to us? <i>(Please specify name of person, internet, yellow pages, etc.)</i>	Please indicate your preferred method of contact <input type="checkbox"/> Telephone <input type="checkbox"/> Email <input type="checkbox"/> Cell phone

If you do not wish to be added to our email/ mailing list, please indicate by checking this box

For Internal Use	Client Name:				
Client Matter Code:		Retainer Amount:	\$	Estimate:	\$
Atty Assigned to File		Ass't Assigned to File		Atty to Sign Retainer	
Description of Services:					