

**THE LAW OFFICE OF  
WILLIAM S. SMITH**

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**WEBSITE BASIC BACKGROUND SHEET FOR POSSIBLE CASE**

Kindly complete the below and email it to us at: [holdenattorney@gmail.com](mailto:holdenattorney@gmail.com)

The purpose of this form is merely to gather the information needed by the Attorney before scheduling any initial consultation. The purpose of an initial consultation is for the attorney to advise you, the prospective client what if anything, may be done for you, and what the minimum fee therefor will be. The purpose is not to render a definitive legal opinion as it may be impossible to fully assess a matter within the time frame allotted for a consultation or with the (information or documents) that you may be able to provide at the initial consultation. Note: The following questions will help us to understand the reason for your consultation. Your responses are protected by attorney/client privilege and will be held in strict confidence.

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

First: \_\_\_\_\_

Middle: \_\_\_\_\_

Are you known by any other names? [ ] Yes [ ] No If yes name(s): \_\_\_\_\_ (A fictitious name, a nickname, a former name, your maiden name etc.)

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

City: \_\_\_\_\_ State: \_\_\_\_\_

Zip: \_\_\_\_\_ Contact Information Home Phone (\_\_\_\_) \_\_\_\_\_ [ ] Primary Contact

Number Work Phone (\_\_\_\_) \_\_\_\_\_ [ ] Primary Contact Number Cell Phone (\_\_\_\_)

\_\_\_\_\_ [ ] Primary Contact Number Email: \_\_\_\_\_

Briefly explain what you may need legal assistance with today:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

*KINDLY ALSO INCLUDE COPIES OF ANY RELEVANT DOCUMENTS, BUT USE A PASSWORD PROTECTED PDF FILE IF ANY SUCH DOCUMENTS ARE CONFIDENTIAL IN NATURE AND TEXT THE PASSWORD FOR SUCH FILE TO ATTORNEY AT 774-364-1754.*

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, but no immediate hardship in the interim.  Just thought I'd see if it was worth pursuing, but I'm not counting on anything.  Just wanted to know what my rights are? I'll then let you know after I think about it. 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) Are we the first attorneys you have consulted regarding this matter?  Yes  No If No – Why didn't you hire their services? \_\_\_\_\_

Have you ever been represented by an attorney before?  Yes  No If Yes – Please state the circumstances \_\_\_\_\_

\_\_\_\_\_ How did you learn of our office:  A friend  Former Client  Our Web Page  Web Search (Please specify. e.g., Google, etc.) \_\_\_\_\_  Other: \_\_\_\_\_

**PLEASE READ CAREFULLY AND ACKNOWLEDGE BELOW** Following your initial interview, if you agree to hire the Attorney, and the Attorney agrees to represent you, you will both sign an Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation. If the Attorney is willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with the Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

NOTICE: This office does not represent you with regard to the matters you set forth in this information sheet or discussed during your consultation unless and until, both you and the Attorney execute a written Agreement for Representation and both parties have fulfilled any specific requirements set forth therein pertaining to what causes the representation to commence. If the Attorney does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, nor any other matters you may discuss with the Attorney during your consultation. If your legal problem(s) involve a potential lawsuit or some other legal action that has time limits for filing one or more documents, it is

important that you realize a lawsuit or other action, document etc. must be filed within a certain period of time called a Statute of Limitations (or other filing deadline). Therefore, the Attorney strongly urges you to immediately consult with another attorney to protect your rights. The Attorney's decision not to represent you should not be taken by you as an expression regarding the merits of your case. Your signature acknowledges only that you received a copy of this completed information sheet and does not mean you have hired the Attorney.

[ ] I acknowledge that completion of this form does not mean that I have hired this firm or any attorney working for this firm. I understand that unless and until both myself and the Attorney have executed a written Agreement for Representation, neither firm nor any attorney working for this firm represents me in this matter.