



INITIAL CONFERENCE INTAKE SHEET

Date: _____

CLIENT: (PLEASE USE FULL NAME AND MIDDLE INITIAL)

Name: _____ SSN _____

Physical Address: _____ City _____ State _____ Zip _____

Mailing Address: _____ City _____ State _____ Zip _____
(if different from physical address) In what County do you reside: _____

Date of Birth _____ Birthplace: _____, _____
(City) (State)

Home Telephone: _____ Work Telephone: _____ Ext. _____

Cell Telephone: _____ Email: _____

Please indicate the best place to contact you: Home ___ Work ___ Cell ___

Employer: _____ Gross Annual Income: _____

Work address: _____

Are you a U.S. Citizen? Y / N If not, what is your immigration status: _____

OTHER PARTY: (PLEASE USE FULL NAME AND MIDDLE INITIAL)

Name: _____ SSN _____

Physical Address: _____ City _____ State _____ Zip _____

Mailing Address: _____ City _____ State _____ Zip _____
(if different from physical address) In what County does other party reside: _____

Is he/she a u.s. citizen _____

If not, what is his/her immigration status _____

Date of Birth _____ Birthplace: _____
(City) (State)

Home Telephone: _____ Work Telephone: _____ Ext. _____

Cell Telephone: _____ Email: _____

Employer: _____ Gross Annual Income: _____

Work address: _____

Is the Other Party a U.S. Citizen? Y / N If not, what is that person's immigration status:

MARITAL STATUS:

Date spouse/partner first resided in California: _____

Wife's Maiden Name: _____

Date Married/Registered Domestic Partnership: _____

Where Married/Registered Domestic Partnership: (City & State): _____

Date Separated: _____ Date of Dissolution, if applicable: _____

Date you first resided in California (continuously): _____

Date spouse first resided in California (continuously): _____

CHILDREN:

Name: _____ Age: _____ DOB: _____ SSN _____

Name: _____ Age: _____ DOB: _____ SSN _____

Name: _____ Age: _____ DOB: _____ SSN _____

Please specify if any children are from a previous relationship:

Please specify if any children of this relationship have Native American Heritage:

Other information to be brought to the attention of the attorney:

REFERRAL:

How were you referred to our office?

- By a friend or relative (please specify name): _____
- Lawyers.com
- Yellow Pages
- Internet (please specify source): _____
- Other _____

Thank you.