

CLIENT DATA SHEET

Today's Date _____

Case No. _____

How did you hear about us? (check all that apply)

- Yellow Pages Newspaper Letter Sign out front Wisconsin State Bar Association
 Person _____ Other _____

Client Name _____

Birthdate ____ / ____ / ____ SS# ____ - ____ - ____

Street _____

Phone (Home): _____

City _____ State _____ Zip _____

Phone (Work): _____

Email: _____

Phone (Cell): _____

Fax: _____

Spouse's Name _____

Birthdate ____ / ____ / ____ SS# ____ - ____ - ____

Street _____

Phone (Home): _____

City _____ State _____ Zip _____

Phone (Work): _____

Email: _____

Phone (Cell): _____

Fax: _____

What type of case do you need legal services for?

- | | | | |
|---|---|---------------------------------------|--|
| <input type="checkbox"/> Bankruptcy/Financial | <input type="checkbox"/> Family (adoption, divorce) | <input type="checkbox"/> Real Estate | <input type="checkbox"/> Taxes |
| <input type="checkbox"/> Business | <input type="checkbox"/> Landlord/Tenant | <input type="checkbox"/> Small Claims | <input type="checkbox"/> Wills/Estate Planning |
| <input type="checkbox"/> Criminal | <input type="checkbox"/> Personal Injury | <input type="checkbox"/> Work Comp | <input type="checkbox"/> Other _____ |
- Date of accident _____

Names and addresses of other people involved

Phone: _____

Phone: _____

Fax: _____

Fax: _____

For Office Use Only

Case Type: _____

Primary Timekeeper: _____ Written, signed contract given to client on (date) _____

Hourly; Rate: \$ _____ Retainer paid: \$ _____

One-time Fee: \$ _____ Flat Fee: \$ _____ Contingent Fee %: _____

Bill to address (if different than above): _____