



Will/Estate/Trust Intake Sheet

Date: _____

Your Full Name: _____

Residential Address: _____

City: _____ State: _____ Zip: _____

Home #: _____ Work #: _____ Cell #: _____

E-mail Address: _____

DOB: _____

What type of matter are you here to discuss? (Circle all that apply) Other: _____

- | | | | | | |
|----------------|----------------------|-------------|------------|---------------------|----------|
| Divorce | Separation Agreement | Custody | Visitation | Support | Adoption |
| Juvenile Court | Prenuptial Agreement | Name Change | Paternity | Estate/Will/POA/AMD | |

Where did you hear about Shupert Law? _____

1. Please list your assets: _____
- _____
- _____

FREE CONSULTATION WAIVER/ACKNOWLEDGMENT

In order to receive a free consultation, you hereby agree to waive any potential conflict of interest between the attorney, your spouse and yourself. This waiver will be in full force and affect until you either hire us to represent you, or you pay a consultation fee. You understand that following your free consultation, we may still represent the opposing party, unless you retain us or pay the consultation fee. You also acknowledge that we are not obligated to represent you unless you sign a written retainer agreement and pay the required retainer amount.

Please initial here to indicate you have read and agreed to these terms: _____

For Office Use Only:

Results of Conflict Check: _____

Quote: