



## LEGAL INTAKE QUESTIONNAIRE

### CIVIL LITIGATION

#### **Client Information:**

Full Name: \_\_\_\_\_

Email Address: \_\_\_\_\_

Phone Numbers: \_\_\_\_\_

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

County/City/State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

#### **Lawsuit Information**

1. Are you looking to file a lawsuit against someone?

No

Yes

If yes, what is the nature of the lawsuit:

Employment

Personal Injury

Contract Dispute

Probate

Other: \_\_\_\_\_

## Employment Lawsuit (If applicable)

1. Who is your employer? \_\_\_\_\_
2. What is your position? \_\_\_\_\_
- 3.. What is your annual income? \_\_\_\_\_

4. What adverse action did you suffer?

Termination

Suspension

Demotion

Discipline

Other \_\_\_\_\_

5. When did this occur? \_\_\_\_\_

6. What damages have you suffered? \_\_\_\_\_

7. Have you lost money?

NO

YES

How much? \_\_\_\_\_

## Contract Dispute (If applicable)

1. What type of contract? \_\_\_\_\_

2. Who signed the contract? \_\_\_\_\_

3. What terms have been breached/How was the contract broken?

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4. What is the damage?

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5. Do you have a copy of the contract?

No

Yes (Please provide)

6. Were there any oral agreements related to the contract?

No

Yes please explain:

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### **Probate (If applicable)**

1. Is there a trust or will involved in the probate?

No

Yes,

2. Who is the trustee? \_\_\_\_\_

3. Who are the beneficiaries? \_\_\_\_\_

4. What is the estimated value of the estate? \_\_\_\_\_

5. What stage is the probate in?

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## Personal Injury (If applicable)

Please fill out the personal injury form found here [Personal Injury | Goyette, Ruano & Thompson, Inc. \(grtlaw.com\)](https://www.grtlaw.com/Personal-Injury-Goyette-Ruano-Thompson-Inc)

## Other (If applicable)

Please describe the nature of your case:

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## Defendant Information

1. Has someone filed a lawsuit against you?

No

Yes

Who has sued you?

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What is the basis of the lawsuit?

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Do you have the case number?

Yes (Please provide) \_\_\_\_\_

No

Yes

**PLEASE READ THIS, IT IS IMPORTANT:**

By submitting this potential client intake form you are not establishing an attorney-client relationship with GRT. We are making no commitment to take your case and we are not taking any action on your behalf. In the event that we might be interested in taking your case we will communicate with you further and gather more information. No attorney-client relationship will exist if and until you and GRT execute a comprehensive attorney-client retainer/fee agreement.

**NOTE, GRT DOES NOT DO FREE OR NO COST CONSULTATIONS OR EVALUATIONS IN MOST CASES.**

I have read and I fully understand the notice upon this intake form.

SIGNATURE: \_\_\_\_\_

DATE: \_\_\_\_\_

# ADDITIONAL INFORMATION

REDWOOD CITY  
**888 993 1600**

GOLD RIVER/SACRAMENTO  
**916 851 1900**

MODESTO  
**209 491 4800**

FRESNO  
**559 268 7768**

SAN FRANCISCO  
**888 993 1600**