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## **Checklist For Your Initial Consultation**

This is a partial list of the information you will be asked to supply the first time you come into our offices. Not all of these questions apply to all matters, but it is important that we have as full an understanding as possible of your circumstances so that we can best represent you and provide good, informed counsel.

1. Your full name;
2. Any other names you have used (A previous married name, for example);
3. If someone referred you to us, who they are;
4. Your current address and your spouse's address if it is different;
5. Addresses at which you have lived during the past 5 years;
6. Your birth date;
7. Your Social Security Number (We ask for this because many courts require it to file documents, plus it allows us to make sure that any research we do finds out information pertaining to you and not to someone with the same name. Please be assured that your communication with our office is strictly confidential, safe and protected by the rules of Attorney Client Privilege.)
8. Your family status (Married, single, divorced, etc.);
9. Your marital history (Previous marriages, divorces, etc.);
10. Your spouse's name and birth date;
11. Your children's' names and birth dates;
12. Where your children live;
13. Where you work;
14. Your income;
15. Where your spouse works;
16. Your spouse's income;

17. Your assets and liabilities (Real estate you own, investments, pensions, 401Ks; debts, judgments, liens);
18. Your legal history (Arrests, convictions, financial judgments, litigation, divorces, support you pay or receive, custody arrangements, Protection From Abuse Petitions, etc.);
19. The purpose of the consultation;
20. The specific details of your case;
21. Please bring any documents—such as copies of letters or emails, police reports, complaints filed by or against you, medical records, previous Wills—or any other material pertinent to your individual case with you to your consultation.

Specific types of cases require other information; we can discuss this over the phone or by email when you schedule your consultation. You are invited to ask any questions you wish, including why we ask for some types of information. Remember: *All* of your communication with our office is strictly confidential, safe and protected by the rules of Attorney Client Privilege.