

GOLDSMITH & GUYMON

A Professional Law Corporation

Dara J. Goldsmith, Esq.★
Marjorie A. Guymon, Esq.★★
Peter Co, Esq.
Kendal L. Davis, Esq.

Also admitted in Arizona, California & Hawaii ★

Also admitted in Utah ★★

NEW CLIENT INFORMATION FORM

(Business/Corp/LLC/Partnerships)

The following information will assist the attorney in the initial interview and will save time (and, therefore, fees). Please print legibly. (Feel free to attach your business card in lieu of name, address, etc.) If you do not have sufficient room to complete an answer, please write on the back of the page (and so indicate). Answer to the best of your ability. You can discuss any problems or questions when you meet with the attorney.

There is generally a fee for the initial consultation, and you may leave a check with the receptionist or the attorney's secretary. If further services are agreed upon, you will be asked to sign a fee agreement and to pay a retainer.

The purpose of this initial consultation is to give you the opportunity to describe your legal problem. The attorney will then set forth your options under the law and estimate the time and expense involved. Seldom is there an easy answer to a complex legal problem, but we will do our best to answer your questions and address your concerns.

GENERAL INFORMATION:

YOUR NAME: _____ DATE: _____

ADDRESS: _____

PHONE(S): HOME: _____ BUSINESS: _____

CELLULAR: _____ FAX: _____

SOCIAL SECURITY NO. _____ OCCUPATION: _____

TAXPAYER IDENTIFICATION NUMBER: _____

LIST THE NAME(S) OF ANYONE ACCOMPANYING YOU TODAY:

WHO REFERRED YOU TO OUR FIRM? _____

TO WHICH ATTORNEY WERE YOU REFERRED? _____

BUSINESS INFORMATION:

NAME OF BUSINESS OR PROPOSED BUSINESS: _____

ADDRESS: _____

BRIEFLY DESCRIBE THE NATURE OF YOUR BUSINESS OR WHY YOU ARE SEEKING OUR ADVICE:

NUMBER OF EMPLOYEES: _____

IF AN EXISTING BUSINESS: _____
_____ SOLE PROPRIETORSHIP
_____ PARTNERSHIP
_____ CORPORATION (S or C - circle one)
_____ LIMITED LIABILITY COMPANY

LIST THE NAMES OF ALL BUSINESSES OR PARTNERSHIPS IN WHICH YOU HAVE AN OWNERSHIP INTEREST, EXCEPT FOR INVESTMENT ONLY:

LIST THE NAMES OF ALL KEY PERSONNEL WITHIN YOUR COMPANY IN ANY BUSINESSES IN WHICH YOU ARE INVOLVED; OTHER THAN SOLELY FOR INVESTMENT (Please identify which business and whether each person is a Stockholder (S), Director (D), Officer (O), Partner (P), or Key Employee (KE):

CONFLICTS:

In addition to your business key personnel, the following information is necessary so that we can avoid any conflict of interest:

SPOUSE'S NAME: _____

NAMES OF CHILDREN:

LIST NAME, ADDRESS AND PHONE NUMBER OF YOUR ACCOUNTANT:



DOCUMENTS:

Make sure to provide the attorney with all relevant documents.

HAVE YOU BROUGHT WITH YOU ALL DOCUMENTS RELATING TO YOUR LEGAL PROBLEM?

YES _____ NO _____

IF YOU HAVE NOT BROUGHT ALL RELEVANT DOCUMENTS, WHAT OTHER DOCUMENTS EXIST AND WHERE ARE THEY?

DOCUMENTS

LOCATION

_____	_____
_____	_____
_____	_____
_____	_____

(Signature)