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Managing Your Money—Applications

Intake Form: Litigation Questionnaire

Many aspects of managing your money can make you want to consult a lawyer. Someone might steal your money, your credit cards, or even your identity. You may be cheated or poorly treated by a bank or a financial planner. A credit card company might not reverse charges you didn't make. Often, a lawyer can help by explaining your options or writing letters. If the problem is serious enough, a lawyer can help you sue to protect your rights.

Litigation involving your money can be legally complicated and time-consuming. In many cases, the first time commitment is finding an attorney. While you may already have an attorney who has helped you with your will or some other legal issue, he or she might not be experienced in litigation. Sometimes you will have to find an attorney from scratch.

In order to do the best possible job on your behalf, your attorney needs your input and cooperation. At your first meeting with your attorney, you should be prepared to provide the following information:

INFORMATION ABOUT YOU

Name _____

Address, Including County

Length of Time at that Address _____ years

Previous Address(es) (for last 10 years)

Your Work Telephone Numbers _____

Your Home Telephone Numbers _____

Facsimile Number _____

E-mail Address _____

Web page (if any) _____

Former Name(s) _____

Your Position _____

Other litigation you *have been* involved in:

Other litigation you *are* involved in:

INFORMATION ABOUT WHOEVER IS CAUSING THE PROBLEM

Name _____

Is your opponent a business? _____

Form of your opponent's business (corporation, partnership, sole proprietorship, etc.)

Place of doing business _____

Address, Including County

Length of Time at that Address _____ years

Previous Address(es) (for last 10 years)

Their Work Telephone Numbers _____

Their Home Telephone Numbers _____

Facsimile Number _____

E-mail Address _____

Web page (if any) _____

Former Name(s) _____

Related Business(es) _____

Your Contact Person at the Opponent _____

Other officers or officials of the business:

Are you aware of any litigation you opponent has been involved in?

Annual sales or income \$ _____

What does your opponent or your opponent's business make or do?

INFORMATION ABOUT THE INCIDENT (WHY ARE YOU GOING TO A LAWYER?)

Describe the incident that occurred:

How much are the damages you have suffered? \$_____

How much have you budgeted for if you have to sue? \$_____

Are there written documents which relate to any contracts or agreements you have with your opponent? _____

Is there correspondence between you and your opponent? _____

Are you aware of any claims your opponent may have against you? If so, please explain:

What outcome do you want from seeing the lawyer? Do you just need someone to stop bothering you about an unfair debt, for example, or do you need to recover money?
