

DISCLAIMER

The following form is provided by Lawoffice.com from West Legal Directory for informational purposes only and is intended to be used as a guide prior to consultation with an attorney familiar with your specific legal situation. Lawoffice.com is not engaged in rendering legal or other professional advice, and this form is not a substitute for the advice of an attorney. If you require legal advice, you should seek the services of an attorney by linking to Lawoffice.com. © 2000 Lawoffice.com. All rights reserved.

INSURING YOURSELF AND YOUR ASSETS

INTAKE QUESTIONNAIRE

Although most insurance companies are honest and reputable, insurers sometimes don't live up to their obligations. Litigation involving insurance coverage can be legally complicated, and it can also be time-consuming. In many cases, the first time commitment is finding an attorney. While you may already have an attorney from other events in your life, he or she might not be experienced in insurance coverage litigation. You may have to find an attorney from scratch.

In any litigation, you will need the counsel and representation of a seasoned advocate to help you through the process. You will want to meet with any attorney you are considering to see if you can work together. You will really be interviewing the attorney just like you are interview a job applicant.

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 ten years)

Your Work Telephone Numbers _____

Your Home Telephone Numbers _____

Facsimile Number _____

E-mail Address _____

Other litigation you *have been* involved in

Other litigation you *are* involved in

INFORMATION ABOUT YOUR INSURER

Name _____

When did you buy the policy? _____

Agent who sold you the policy: _____

Address, Including County

Policy Numbers _____

Previous Insurance Policies (for last ten years)

Policy Numbers

Who was your contact person at the insurer? _____

Have you made claims under this policy before?

Have you made claims from this insurer before?

INFORMATION ABOUT THE INCIDENT- WHY IS THIS GOING TO COURT?

Describe the incident that gave rise to the loss:

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

Do you have any correspondence or other written documents that relate to any contacts you have had with your insurer?

Are you aware of any claims or defenses your insurer may have against you? If so, please explain them.

Is there anything you haven't told your insurer?

Has your insurer offered to settle with you? _____

For how much? \$_____