[Your firm name]

Criminal defense - Short web form

Full name

Phone number

Email address

Is the person charged in custody now?

☐ In custody ☐ Released ☐ Not sure

What happened? A few lines is fine.

How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

☐ It is OK to text me about my inquiry (optional)

[Send]

[Add your firm's disclaimer here, worded by your ethics counsel.]

[Your firm name]

Criminal defense - Intake call sheet

CONTACT DETAILS

1. Full name

2. Best phone number

3. Email address

4. Best time and best way to reach you (call, text or email)

5. City and state where you live

6. Preferred language. Do you need an interpreter?

7. Who is calling: the person charged, or a family member or friend? If it is not the person charged, their name and phone number

CONFLICT CHECK

8. Full names of the other people or companies involved (the opposing parties)

9. Anyone else connected to this matter, such as a witness, employer, landlord or insurance company

10. Have you or a family member ever been a client of this firm?

☐ Yes ☐ No

THE MATTER

11. Custody status: in custody or released? If released, on bail or on their own promise to appear?

☐ In custody ☐ Released ☐ Not sure

12. What is the charge, or the reason for the arrest?

13. Which court, and the case number if you know it

14. If in custody: which jail, the booking number, and any bail amount set

15. Any other open cases, or probation or parole?

16. In your own words, what happened and what help do you need?

17. Have you already spoken to or hired another attorney about this? If yes, who and when?

18. What would a good result look like for you?

KEY DATES

19. Date of the arrest or incident

20. Next court date and time

21. Any letter, notice or court paper you have received about this? The date on it, and whether you have it with you

HOW THEY FOUND YOU

22. How did you hear about us?

☐ Google search ☐ Google Maps ☐ An online ad ☐ Referral from a person ☐ Social media ☐ Other

23. If a referral: who referred you? If an ad or a search: what were you looking for, or what did you see?

CONSENT TO CONTACT

24. Is it OK for us to call and email you about this inquiry?

☐ Yes ☐ No

25. Is it OK to leave a voicemail or message at this number?

☐ Yes ☐ No

26. Is it OK to send you text messages about this inquiry?

□ Yes □ No

FOR THE FIRM TO COMPLETE

Call taken by

Date and time of the call

Result (consultation booked, signed, referred out, declined)

Next step, who owns it and by when

A starting point for your intake team. Not legal advice. Have your ethics counsel review it before you use it.