[Your firm name]

Family law - Short web form

Full name

Phone number

Is it safe for us to call, text or email you?

☐ Yes ☐ No ☐ Only at certain times

Email address

What kind of matter is it?

☐ Divorce ☐ Child custody ☐ Child or spousal support ☐ Protective order ☐ Something else

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

[Send]

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

[Your firm name]

Family law - 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. Is it safe to call, text or email you at this number? Can we leave a message?

☐ Safe to call ☐ Safe to text ☐ Safe to email ☐ Safe to leave a message

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. What kind of matter is it?

☐ Divorce ☐ Child custody ☐ Child or spousal support ☐ Protective order ☐ Something else

12. Children involved: names and ages

13. Any existing court orders (custody, support, protective order)? The court and case number

14. Has the other person already filed anything or hired an attorney?
□ Yes □ No

15. Is there any safety concern for you or the children right now?
□ Yes □ No

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 marriage and date of separation, if either applies

20. Any court dates coming up? Date, court and case number

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.