

CLIENT INFORMATION SHEET

Date: _____

Client and Contact Information

Client Name: _____ Contact Person: _____

Address: _____ Address: _____

Tel.: _____ Email: _____

Fax: _____ Alt. Tel.: _____

ATTENTION: Your returning this form to McGunagle & Reidy, Ltd. does not create an attorney-client relationship. Any information forwarded to McGunagle & Reidy, Ltd. before an attorney-client relationship is established may not be deemed confidential or otherwise protected.

*** * * FOR OFFICE USE ONLY * * ***

File No.: _____

Source: _____

Attorney: Ken McGunagle Ted Reidy Rich Hentz Other: _____

File Opened In: Timeslips Word ProForm

Subject Matter: Real Estate (__ purchase, __ sale, __ other) General Corporate
 Wills/Trusts/Estate Planning Commercial Borrower/Seller
 Probate New Business Entity
 Commercial Lending Landlord/Tenant
 Other: _____

Conflict Check: Check for Client and _____

Results: None (date performed: _____ performed by: _____)
 Conflict (return to Attorney for resolution)
 N/A (initials: _____)

Engagement Letter: Yes (date: _____ prepared by: _____)
 N/A (initials: _____)

Retainer: Yes (amount: \$ _____)
 N/A (initials: _____ reason: _____)

Legal Plan: None Signature Hyatt Legal Plan ARAG

Account/Plan Number _____ SSN: _____

Name and Address of Employer: _____

