

The Law Offices of David M. Lederman

Moraga - Antioch

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NEW CLIENT INFORMATION

Please fill out this form the best you can and return it to our office. We need to know this information in order to effectively assist you. As always, all the information you supply us will be kept STRICTLY CONFIDENTIAL.

Please note the initial consultation fee is due upon arrival: \$400 for the first hour, and \$75 every 15 minutes thereafter. Thank you.

Consultation with: ___ David Lederman ___ Jorge Guardado ___ Sharmeela Kawos

How did you hear about us?

Referral from _____ Prior Relationship/Former Client
 Newspaper/Journal Internet Site _____
 Yellow Pages
 Valley Yellow Pages
 SBC Yellow Pages

Date: ____/____/____

Client Name: _____ D.O.B: ____/____/____

Social Security #: ____-____-____ Driver's License #: _____

Maiden or Other Name: _____

Present Address: _____

City: _____ County: _____ State: ____ ZIP: _____

Home Phone: (____) ____-____ May we leave a message? _____

Cell Phone: (____) ____-____ Special Instructions: _____

E-Mail Address: _____ Private: Yes _____ No _____

Work Address _____

City: _____ State: ____ ZIP: _____

Occupation: _____ Monthly Income: \$ _____

Work Phone: (____) ____-____ May we call at work _____

Work E-Mail Address: _____ Private: _____

Spouse (or opposing party):

Name: _____ D.O.B: ____/____/____

Address: _____

City: _____ State: _____ ZIP: _____

Social Security #: ____ - ____ - ____ Driver's License #: _____

Occupation: _____ Monthly Income: \$ _____

City: _____ State: _____ Phone Number _____

Will he or she cooperate in this matter? _____

Date of Marriage: ____/____/____ **City:** _____ **State:** _____

Date of Separation: ____/____/____ **City:** _____ **State:** _____

How long have you lived in California? _____ (months) in County? _____ (months)

Other Information:

Opposing Counsel's name: _____

Opposing Counsel's address: _____

Opposing Counsel's phone number: _____

No. of Marriages for Husband: _____ for Wife: _____

No. of Children: _____ Under age 18: _____ Residing with You: _____

Child's Name: _____ Sex: ____ D.O.B: ____/____/____

Child's Present Address: _____

City: _____ State: _____ ZIP: _____

Child's Name: _____ Sex: ____ D.O.B: ____/____/____

Child's Present Address: _____

City: _____ State: _____ ZIP: _____

Child's Name: _____ Sex: ____ D.O.B: ____/____/____

Child's Present Address: _____

City: _____ State: _____ ZIP: _____

Notes:

DOCUMENTS TO BE FURNISHED BY CLIENT

Please bring the documents listed below to our next meeting:

1. Pay stubs for past 3 months
2. Spouse's pay stubs (or copies) for the last 3 months (if possible)
3. Copies of Income Tax Returns, both state and federal, for the past 3 years
4. Copy of Deed to your residence, showing a legal description of the home, and any other real property owned by you or your spouse
5. Copy of the mortgage on your home, on any other real property owned by you or your spouse, and the last monthly mortgage statement
6. Savings passbooks and savings certificates held by you and/or your spouse
7. Corporate stock certificates and/or bonds, and statements from your broker(s)
8. Life insurance policies with statements of loans against same
9. Copy of any pension or retirement programs, or investment programs, you or your spouse may be involved in through your employment
10. Copy of pink slips or registration slips for all vehicles
11. Copy of financial statements or statements of net worth prepared for securing bank loans or for any other purpose
12. Any other information that will help establish you net worth, your spouse's net worth, your joint net worth, your income, and your spouse's income
13. Copy of current Will(s)
14. Any written agreements with spouse entered into before, during marriage, or after separation
15. Copy of any appraisals of property
16. Copy of all promissory notes you and/or your spouse owe to another or owed to you and/or your spouse by another
17. Copy of any other agreements
18. All pertinent court documents
19. Any budgets or other written documents showing current monthly expenses including most recent bank statement and register for bank account used for current bills, and
20. A list of the outstanding bills of you, your spouse, and joint, as of date of separations along with copies of statements of each such bill.

Also, please inventory the household goods and furniture in each room at the earliest possible date, before the property is divided or distributed between the parties.