



WILLIS & CAGLE LAW FIRM

118 E. Graham Avenue | P.O. Box 1062 | Pryor, Oklahoma 74362 | (918) 876-5605

CLIENT INTAKE FORM GENERAL CIVIL MATTER

CLIENT INFORMATION

Legal Name (Last, First, Middle)

Date of Birth

Current Address (Street, City, State, ZIP)

Telephone Number

Best Time of Day to Reach You

Email Address

Employer Name

Employer Phone Number

Employer Address

Occupation / Position

DESCRIPTION OF THE MATTER

Brief Summary of the Matter (e.g., contract dispute, property damage, business dispute, personal injury, collections, other)

Date the Dispute or Incident Arose

Please Describe the Matter in Detail, Including the Key Facts and How It Arose**What Outcome or Relief Are You Seeking? (e.g., money damages, specific performance, injunction, other)****OPPOSING PARTY INFORMATION****Name of Opposing Party (Individual or Business)****Address (if known)****Telephone Number (if known)****Email Address (if known)****Relationship or Connection to You (e.g., business partner, contractor, neighbor, former employer)****Is the Opposing Party Represented by an Attorney? (Yes / No / Unknown — if yes, attorney name and contact information)****CASE STATUS****Has a Lawsuit Already Been Filed? (Yes / No)****Are You the Plaintiff or Defendant?****Court and County (if filed)****Case Number (if filed)****If You Have Been Served with a Lawsuit, What Is Your Response/Answer Deadline?****FINANCIAL INFORMATION**

Approximate Amount in Controversy

Is There Insurance That May Apply to This Matter? (e.g., liability, business, homeowner's — please describe, including carrier name if known)

DOCUMENTS & EVIDENCE

Please bring copies of any relevant documents to your consultation if available.

What Relevant Documents Do You Have in Your Possession? (e.g., contracts, invoices, correspondence, photos, texts/emails)

Are There Any Known Witnesses to the Matter? (Names and Contact Information, if known)

PRIOR LEGAL INVOLVEMENT

Have You Consulted Another Attorney About This Matter? (Yes / No — if yes, name and outcome of consultation)

Are You Aware of Any Deadlines or Statute of Limitations Concerns Affecting This Matter?

ADDITIONAL INFORMATION

Is There Anything Else You Believe Would Be Helpful for Us to Know Before Your Consultation?