



www.heritagelawtx.com

1625 Williams Drive, Bldg 1  
Georgetown, Texas 78628  
Phone: (512) 930-0529

**NEW CLIENT INTAKE**

PLEASE PROVIDE THE FOLLOWING INFORMATION:

**General Information**

Today's Date: \_\_\_\_\_

Full Name: \_\_\_\_\_ Your e-mail address: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_

Name of Your Current Employer: \_\_\_\_\_

Occupation: \_\_\_\_\_ Driver's License #: \_\_\_\_\_

Birthdate: \_\_\_\_\_ Age: \_\_\_\_\_

Social Security #: \_\_\_\_\_ Sex: M F

Marital Status: \_\_\_\_\_ No. of Children: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_

Spouse's SSN: \_\_\_\_\_ Spouse's Birthdate: \_\_\_\_\_

Spouse's Employer: \_\_\_\_\_

How Were You Referred to Heritage Law?: \_\_\_\_\_

Who Will Be Responsible for Your Account With Us?: \_\_\_\_\_

Have you seen another attorney about this matter? \_\_\_\_\_ If yes, who? \_\_\_\_\_

Name and phone number of person, not currently living with you, to contact in case of an  
emergency: \_\_\_\_\_

**Please describe legal matter for which you are seeking legal counsel:**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_