

**GENERAL INTAKE QUESTIONNAIRE**

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Fax: \_\_\_\_\_ Email: \_\_\_\_\_

Referral Source: \_\_\_\_\_

**[NOTE: DO NOT DISCLOSE ANY CONFIDENTIAL INFORMATION HERE.<sup>1</sup> SUBMISSION OF THIS FORM DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP. SEE DISCLAIMER AND ACKNOWLEDGMENT AT THE END OF THIS FORM.]**

**1. ACTUAL OR POTENTIAL ADVERSE<sup>2</sup> PARTIES OR WITNESSES**

*[Complete only if your matter includes one or more persons or entities that are on the other side of your matter, whether it is a dispute or a transaction. Please identify all known actual or potential adverse parties or witnesses.]* \_\_\_\_\_

**2. BASIC DESCRIPTION OF MATTER**

Describe only a brief factual summary. *[Caution: Do not disclose private or confidential information here.<sup>3</sup>]* \_\_\_\_\_

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<sup>1</sup> This is important primarily where there is a risk of an actual or potential conflict of interest – e.g. If I am already representing a person or entity on the other side of your matter, or I decline because of the nature of the matter (a “positional conflict”). Private or confidential information might include such things as personal motivations, communications, monetary concerns relating to the dispute or transaction, confidential objectives, weaknesses or strengths in negotiations, i.e. things that you would not openly disclose to the other side or their attorney. **IF IN DOUBT AS TO WHETHER THE INFORMATION IS PRIVATE OR CONFIDENTIAL PLEASE DO NOT DISCLOSE IT IN THIS FORM.**

<sup>2</sup> Note: The term “adverse” does not necessarily mean there is a dispute. One can be adverse on a transaction or other issue simply because one’s current interests or potential outcomes are not consistent with yours. In most cases, attorneys cannot represent more than one party or entity in the same matter unless their legal positions are consistent. In some cases, a conflict could arise due to my prior representation of *former* clients or legal positions I have taken in prior matters.

**3. YOUR OBJECTIVES**

If this matter involves a dispute with another party, please tell me the type of outcome you would like to see. If it involves a transaction, please tell me the basic terms and timeline.

*[Caution: Do not disclose private or confidential information here.]*

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**4. DISCLAIMER AND ACKNOWLEDGMENT**

Submission of this completed General Intake Questionnaire does not, by itself, create an attorney-client relationship with QUERIN LAW, LLC. I must review it first. There may be some aspect of it that would prevent me from representing your interest, or the matter may simply be outside my expertise. Accordingly, if there is any private or confidential information you do not want to share before confirmation of my representation, please do not disclose. I will request that you pay a retainer into my trust account. **My representation will only commence upon: (a) My confirmation that I will be able to represent you; (b) My receipt of a signed Engagement Letter; and (c) Confirmation of your payment of the retainer.**

I reserve the right to decline representation for any reason, or no reason. In the event there is a conflict *[e.g. existing client on other side of matter; general positional conflict, etc.]* or the matter is not something I feel I can help you with, I will attempt to notify you as soon as possible. If you do not promptly hear back from me, and your matter is extremely time sensitive, you should contact other counsel of your choice. I cannot assume any obligation to refer you to other attorneys. The Oregon State Bar’s Referral Service is (503) 684-3763.

**TO ACKNOWLEDGE THAT YOU HAVE READ, UNDERSTOOD, AND AGREED TO THE ABOVE TERMS, PLEASE SIGN AND RETURN VIA EMAIL OR FACSIMILE.**

AGREED TO THIS \_\_\_\_ DAY OF \_\_\_\_\_, \_\_\_\_\_

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
SIGNATURE

\_\_\_\_\_  
PRINT NAME

\_\_\_\_\_  
PRINT NAME