INITIAL CLIENT INTERVIEW
HOW TO DEAL WITH PROBLEM CLIENTS

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State Bar of Texas
FAMILY LAW 101 COURSE
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Houston

CHAPTER 2
PROFESSIONAL
BACKGROUND
Admitted to practice in Texas, October 22, 1974.
Licensed to practice, U.S. Supreme Court, May 14, 1979.
Board Certified in Family Law, Texas Board of Legal Specialization, State Bar of Texas.
Marr, Meier & Bradicich, Attorneys at Law, Victoria, Texas, September 1, 1974 to present.

EDUCATION
J. D., Texas Tech University School of Law. Graduated, May 1974.
Bachelor of Business Administration, Finance Major, Texas Tech University. Graduated, May 1971.

PROFESSIONAL
ASSOCIATIONS
Member in good standing, State Bar of Texas.
Member, The College of the State Bar of Texas.
President Texas Family Law Foundation - 2006 - 2008
Member, Family Law Council, State Bar of Texas.
Secretary - 1996 - 97
Treasurer - 1997 - 98
Vice-Chair - 1998 - 99
Chair-Elect - 1999 - 00
Chair - 2000-01
Immediate Past Chair - 2001-02
Ex-Officio - Member - Lifetime
Chair - Family Law Section, Legislative Committee - 2006 - Present
Member, Texas Family Code, Title 2 Revision Sub-Committee of Legislative Committee of Family Law Council, State Bar of Texas.
Member, Texas Family Code, Title 1 Revision Sub-Committee of Legislative Committee of Family Law Council, State Bar of Texas.
Member, Alimony Study Committee, Family Law Council, State Bar of Texas.
Member, Family Law Practice Manual Committee, Family Law Council, State Bar of Texas.

CAREER HIGHLIGHTS
Recipient - Texas Academy of Family Law Specialist - Judge Sam Emison Memorial Award for Outstanding Contributions to Family Law - 2007.
Faculty member and course director: Various seminars sponsored by the State Bar of Texas, Texas Academy of Family Law Specialists, South Texas College of Law and American Academy of Matrimonial Lawyers.
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INITIAL CLIENT INTERVIEW, HOW TO DEAL WITH PROBLEM CLIENTS

I. INTRODUCTION
   This article is designed as a practical aid for attorneys based upon 37+ years of experience interviewing clients, setting fees, and identifying and dealing with problem clients. It is an expression of the author’s feelings and recommendations. Some or none of the suggestions may be of assistance.

II. PRE-INTERVIEW - CLIENT INTAKE
   In my office, this is handled by the receptionist.

   A. Conflict Check
      The receptionist obtains the names of relevant parties. In modification cases, this will include the name of the former spouse. In divorce cases, it will include name of current spouse. The receptionist will also ascertain whether the prospective client is a former client. She will run a conflict check by use of a database we maintain. If there is no apparent conflict, the prospective client will be given an appointment.

   B. Consultation Fee
      The receptionist will also advise of the amount of the consultation fee which the client must pay at the initial consultation.

III. INITIAL CLIENT INTERVIEW
   The initial interview accomplishes a number of essential tasks.

   A. Information Gathering and Dissemination of Information
      1. Initial Paperwork
         The information to be gathered includes the personal information needed to properly identify the parties and prepare necessary pleadings. Appendix A works well in my office. I also obtain financial information (See Appendix B) if child support or spousal support is involved. Some attorneys have staff complete the information sheet during a telephone interview before the client and attorney meet. My office does not. The client completes the information when they arrive for the initial consultation.

         The client is also provided a copy of my standard contract of employment and a copy of our court’s standing order which requires participation in a parent stabilization course and a list of sources for a client to enroll in the parent stabilization course.

         I want to be sure the client has read the employment contract before we discuss the case so they know the obligation they are to undertake if they decide to hire me. See Rule 1.04(c), Rules of Professional Conduct. The only employment contract information not provided before the interview begins is the retainer amount and the amount of the minimum escrow balance which the client is required to maintain until the completion of the engagement. That information is determined at the conclusion of the initial interview and is written in the contract before it is signed by the client. One attorney for whom I have great respect, recommends that the client be told to take the contract home, review it, and, if satisfactory, return the signed contract the next day. I do not usually employ that practice. If a client is hesitant about the contract terms, I do recommend that they take the contract home and take time to consider whether they wish to retain me.

         2. Why is the client here to see you?
            Once I verify that the client has completed the “data sheet” provided before the initial interview and reviewed the contract, I then attempt to determine why the client is seeking my services. This is a critical part of the initial interview. This gives you information from the client’s point of view, which allows you to identify the task to be performed (i.e. divorce, modification, enforcement, establishment of paternity, etc.). I usually let the client tell his or her story, with a minimum of questions or redirecting. If it appears the client is wandering off course, I will attempt to refocus them. Many times, letting the client give you an initial narrative will provide you with insight into the client’s personality (See discussion of “problem clients”, infra). This information must include a historical background of events which give rise to the client’s decision to hire an attorney.

         3. Divorce
            In divorce cases, a marital history is necessary, including the nature of “problems” in the marriage (infidelity, abuse, substance abuse, incompatibility, etc.). I always ask the client to tell me the “bad things” they expect their spouse or others to say about them. I preface this with a warning that the client must make full disclosure. In divorce cases, I try to get an outline description and valuation (client’s opinion) of assets and liabilities. Always ask if the asset was acquired during marriage, before marriage, or by gift or inheritance. If the asset is acquired by gift or inheritance, ask if documentation exists to corroborate. If the parties own real estate, determine the time of acquisition. My office customarily obtains copies of deeds and deeds of trust directly from the county records. Knowing the
approximate time of acquisition speeds up the process of locating deeds. Determine the existence of a premarital agreement or a marital property agreement. Does the client support or oppose the validity of the premarital or marital property agreement. Answers to these “property” questions will alert me to potential characterization issues, reimbursement issues, fraud issues, etc. This also gives me an idea of the complexity of the property division issues. This can be followed up by a client homework assignment which is a detailed information sheet designed to provide information regarding the client’s asset holdings and liabilities. A sample of such an information sheet can be found at Form 7-1 of the Texas Family Law Practice Manual, with instructions for preparation of the inventory and appraisement at Form 7-2 of the Texas Family Law Practice Manual.

Maintenance is another issue which must be explored. If the community estate is not liquid or is small, the property received (including the spouse’s separate property) upon divorce may be insufficient to meet the client’s minimum reasonable needs. If the client is unemployed or does not earn a substantial wage, the combination of the client’s separate assets, community property received upon divorce, and earnings may be insufficient to meet the client’s minimum reasonable needs. In such a case, further inquiry must be made to determine the client’s potential eligibility to receive maintenance. Is the client’s earning capacity impaired to the disability or the need to care for a disabled child? Has there been a conviction for family violence? Does the spousal seeking maintenance seek employment, if he or she is unemployed?


4. Suits Affecting the Parent-Child Relationship

SAPCR’s come in many forms. In divorces, the SAPCR part of the case will involve initial custody decisions, possession and access, support and other “case specific” issues such as special needs of a child and adult disabled children (Tex. Fam. Code § 154.301 et. seq.). Beware: Cases involving adult disabled children require special handling in order to avoid loss of benefits for the child. This will likely entail consultation with an attorney experienced with the creation of “special needs trusts”.

In all SAPCR’s, determine the nature of the current relationship between each child and each parent.

Does the father challenge the paternity of any child born during the marriage or during the relationship with the child’s mother, if the parents are not married.

If the client seeks to establish the parent-child relationship, get a history of the relationship between the mother and the alleged father. Does the alleged father’s name appear on the child’s birth certificate? Was there an Acknowledgment of Paternity signed? Was genetic testing done?

If primary custody, possession or access are in dispute (whether an original suit or a modification) you need to know:

- History of parents’ ability to reach shared parenting decisions;
- History of past relationship between each parent and each child;
- Description of current relationship between each parent and each child;
- The client’s position on each disputed issue;
- The client’s perception of opposing party’s position on each disputed issue;
- History of parenting role of each parent (takes to school, doctor appointments, discipline, etc.);
- Work schedule of each parent;
- Determine presence of risk factors presented by a parent (physical abuse, emotional abuse, neglect, alcoholism, criminal activity, etc.);
- Presence of third party paramours;
- Medical care - who takes the child to health care provider; and
- Child’s wishes regarding custody, possession and access.

What evidence relevant to the dispute exists or is believed to exist, including:

- Opinions and records of mental health professionals who have provided care for each parent and each child;
- Documentary evidence such as medical records, school records, diaries, calendars, photographs, electronic records, etc.;
- Anticipated witnesses for each party; and
- Other evidence addressing needs of child or best interest of the child and ability of respective parent to meet those needs.

If the client is a non-parent seeking custody, possession or access (i.e. grandparent, sibling, aunt, etc.), determine the nature of the prior relationship with the child. Discuss the limited circumstances under which the third party may have a right to sue or intervene in an existing suit. Determine whether the client can establish a prima facie case for standing.
Explain the burden of proof to establish standing. Can the client establish “general standing” (Tex. Fam. Code § 102.003) or is the client relegated to limited or specialized standing? Tex. Fam. Code §§ 102.004; 102.045; 153.432; 153.433; 156.002.

If standing can be established, discuss the nature of relief sought by the client. Discuss relevant evidence which would support the relief sought.

Be candid with the client regarding prospects of a successful outcome. Do not sugar coat the situation. Do not undertake a case you know you will lose. Let the client be mad at someone else.

If child support is an issue, determine what issues may be involved in the determination of the amount of child support.

If “guidelines” child support is insufficient to meet the child’s needs, then you are going to need to obtain information that will either “bulk up” the income of the obligor parent or will demonstrate that “proven needs” of the child exceed “guidelines” support. Tex. Fam. Code §§ 154.123; 154.126. You will need to address the existence of fringe benefits provided to the obligor, inheritance or trust income of the obligor, potential unemployment or under-employment issues. You will also need to have the client prepare a detailed budget of expenses for the family unit. This can be used to pro-rate “household expenses” among members of the household and add those to expenses which are solely attributable to each child. Determine whether obligor has obligation to support other children not the subject of the current suit.

If you are representing the obligor, these issues need to be addressed from the perspective of limiting child support to “guidelines” support, or determining if factors exist which would merit “below guidelines” support. Tex. Fam. Code § 154.123. Determine whether obligor receives disability benefits which are payable to the child or for the child’s benefit. Tex. Fam. Code §§ 154.132; 154.133.

Give instructions to obtain available financial records. If needed financial records are not available, determine source of needed information.

5. Enforcement
   If the representation involves enforcement, determine what provisions of the prior order the client seeks to enforce:
   • Child Support
   • Property Division
   • Possession and access

Review the order, if provided at the initial interview.

Determine the date and nature of each alleged violation of the order. In cases of enforcement of property division, determine the date compliance was required. Is there a limitations issue? Identify evidence which will corroborate the alleged violation. For example, has the client maintained copies of letters and receipts mailed or delivered to the other party demanding payment of medical expenses not paid by health insurance. In the case of periodic payments of child support, are payments of child support paid through the State Disbursement Unit or by direct payment. Determine whether there have been demands for performance made by the client before they consulted you? Are those demands documented? If enforcing possession and access orders, is there corroboration or documentation (police reports, text messages, third party witnesses, etc.) of non-compliance?

If you represent the obligor, defensive issues must be identified. What is the “reason” for non-compliance? Is non-compliance disputed? Does evidence of compliance exist?

6. Modification
   If the client seeks modification of a prior order, obtain a copy of the order. Verify authenticity of the order provided by client. Identify date order rendered.

   Why does the client seek modification? Explain to the client the burden of proof necessary to obtain modification of the order provision in question. For example, explain the heightened burden in cases seeking modification of custody within one year of the prior order establishing custody. Tex. Fam. Code § 156.102. Determine the relative circumstances as they existed at the time the prior order was rendered. How have those circumstances changed? What evidence exists to support the allegations of changed circumstances? Discuss the sufficiency of the evidence with the client.

7. Miscellaneous
   During the course of the initial interview, be alert to indications the client is withholding information from you or may seek to engage in abusive, manipulative, or otherwise dishonest behavior. These indicators of bad behavior include:
• Concealment of assets or marital infidelity and unwillingness to make disclosure;
• Statements indicating an intent to engage in or continuation of past behavior designed at alienating a child from the other parent;
• Statements indicating intent to conceal facts from you;
• Arguing with you over ethical issues, client instructions, or fee; and
• Indications that the client frequently and willingly engages in arguments with spouse or former spouse.
• Indications that client has or is considering destruction of evidence.
• Indications of past or intended illegal conduct.

Make it clear that you will not condone or assist the client in spoliation of evidence, the making of false statements, fraudulent, or criminal behavior. Explain your ethical obligation to disclose such behavior by the client. Rule 1.05, Texas Rules of Professional Conduct.

B. Dealing with Problem Clients

This is the most complex task in the practice of family law. This is because we generally encounter our clients at the most difficult times in their lives. The problem one of determining whether you are dealing with a good person going through a bad time or whether you are dealing with a bad person. Sometimes, you don’t discover the answer soon enough to avoid trouble.

1. Identifying the Problem Client at Initial Interview

There is no bright line test which will identify a problem client at the initial interview. However, there are some indicators.

(a) The client who brings you the pleadings and current orders in a current case and complains about their attorney.

If you know the client’s current attorney to be competent, then this is a strong indication that the client will be a problem and will most certainly complain to someone about you.

One test of the client’s “bona fides” is to tell them you will not consider undertaking their case unless they authorize you to speak directly with the attorney about the complaints they have brought to their attention. That will usually end the discussion. If not, and the client authorizes you to discuss the matter with their attorney, then do so. It may be that the attorney will agree that there is a personality conflict or inability to communicate effectively with the client. On the other hand, the attorney may be able to confirm your suspicion that you are dealing with an unreasonable client.

Also, in this category are clients who are already on their second or third attorney in the same case and clients who have not paid their current attorney.

(b) The client who shows up for the initial interview accompanied by their parent, sibling or best friend.

First, this is a tip off that you may be answering questions from more than one person during the representation. I believe it is also an indication that your client has personal insecurities that will be problematic in decision making moments. A client who has to make decisions by committee is a problem. They may also have a tendency to share your advice with their friends or family. This, in turn, can lead to unwanted disclosure of information to the “wrong people”. You should explain your concerns about confidentiality. If a parent is paying the bill, you should also explain that the parent does not have the right to demand or receive information from you. You should also advise that any refund of unearned fees will be paid to the client, not the third party payor. Finally, you should make it clear that you will discuss the case with the client only. The problem is, you never know who is really asking the questions or making the decisions. Although this can be a problem in any representation, it is more likely to be a problem with a client who shows up for an initial interview with “friends and family in tow”. My advice is to kick the third parties out of the interview or don’t take the case.

(c) The client who makes statements about hiding assets, being untruthful, engaging in illegal interception of communications, or altering or destroying records.

I am not addressing the client who simply asks “Do I have to tell my wife that I have a bank account at XYZ bank?”, or “Can I record my husband’s conversations with his girlfriend?”. These are common questions which can usually be addressed successfully by advising
that full disclosure is required or that certain conduct is illegal. I am addressing the client who states “I’ve taken protective measures to see most of my money is safe from my wife. I’m not going to discuss this with you. What you don’t know won’t hurt you.”.

This client is a train wreck waiting to happen. If the deception is discovered (and they often are), your case will end in disaster and your credibility will be damaged.

This person should not be accepted as a client. They will probably lie to you also.

(d) The client who records or asks permission to record your interview. I absolutely refuse to allow recording of my discussions with a client. If I determine that they are recording our conversations, I withdraw. A client who does not trust you is a problem you don’t need. If the client’s memory is so unreliable they need to record all conversations with you, they need a guardianship, not a lawyer.

(e) The client who admits to a concerted effort to alienate children from the other party is a problem.

By this, I am attempting to differentiate between unconscious alienating behavior and behavior which is intentional, systematic and calculated to destroy the relationship between the children and the other parent.

You should not accept employment by this client or withdraw if you learn of continued conduct by the client after you have admonished the client to cease the bad conduct.

(f) The client who argues, complains, or attempts to haggle over your fee at the initial interview. Don’t compromise your fee or your retainer. The most unreasonable client in any legal proceeding is the client who has a “free” lawyer. Do not undertake representation of a client who argues about your fee from the beginning of the case.

In this same category is the client who complains they are “getting nothing” for their money. These clients should be dismissed promptly. Even if they pay their bill, they will bad mouth you to the members of the public and damage your representation.

(g) The client who will not cooperate with you or your staff in providing documents and information needed to respond to discovery or assist you in preparation of the case.

You must explain to the client that failure to cooperate with your staff and provide needed information is contrary to the client’s best interest. If that does not secure the client’s cooperation, it is time to withdraw.

(h) The client who is rude or abusive to your staff.

This cannot be tolerated. The client should be told that such behavior will not be tolerated. If the client persists in the bad behavior, it is time to withdraw.

Certain rude behavior is of such a nature that no warning is sufficient. The respect of your staff is more important than the fee the client will pay. Get rid of the client immediately.

(i) The client who is married to a true “nutcase”.

When the client begins to describe the outrageous behavior of their spouse, you should be alert to the possibility that your client may be equally capable of irrational or outrageous behavior. I do not suggest that you should not undertake this representation. However, you should be alert to the possibility that your client can and will engage in irrational behavior. You need to be prepared to deal firmly with the bad behavior if it occurs. “Bird of a feather...”.

2. Rules for dealing with problem clients.

(a) If you see they are a problem, don’t take the case.

(b) If you violate “(a)” above, never let the client put you in a position of an ethics violation or a violation of your professional duty to the court or your fellow lawyer. Withdraw from the representation.

(c) If you violate “(a)” above, deal directly with the client’s bad behavior. Do not cut the client any slack. Tell them what they have done
wrong. Tell them that the behavior will not be tolerated again. If the client is offended by your directness, invite the client to seek other counsel.

(d) If bad behavior persists after your attempt at remedial action per item “(c)” above, withdraw.

C. Setting your fee.

1. Factors to Consider

The factors to consider in setting your fee are established by Rule 1.04, Rules of Professional Conduct. These rules provide the facts which may be considered include:

(a) the time and labor required, the novelty and difficulty of the questions involved, and the skill requisite to perform the legal service properly;

(b) the likelihood, if apparent to the client, that the acceptance of the particular employment will preclude other employment by the lawyer;

(c) the fee customarily charged in the locality for similar legal services;

(d) the amount involved and the results obtained;

(e) the time limitations imposed by the client or by the circumstances;

(f) the nature and length of the professional relationship with the client;

(g) the experience, reputation, and ability of the lawyer or lawyers performing the services; and

(h) whether the fee is fixed or contingent on results obtained or uncertainty of collection before the legal services have been rendered.

It is my opinion that you should not set a contingent fee in a family law case. The commentary to Rule 1.04, Rules of Professional Conduct explains:

“Contingent and percentage fees in family law matters may tend to promote divorce and may be inconsistent with a lawyer’s obligation to encourage reconciliation. Such fee arrangements also may tend to create a conflict of interest between lawyer and client regarding the appraisal of assets obtained for client. See also Rule 1.08(h). In certain family law matters, such as child custody and adoption, no res is created to fund a fee. Because of the human relationships involved and the unique character of the proceedings, contingent fee arrangements in domestic relations cases are rarely justified.”

Although I sincerely believe that the setting of a fee cannot “promote divorce”, the comment is certainly cautionary and should be heeded.

2. The reality of setting a fee

Attorneys are problem solvers, by nature. In the family law arena, we champion our client’s causes. This mind set leads us to be sympathetic toward our client, sometimes to a fault.

(a) Rule 1

Sympathy for our client’s plight has no place in the setting of a fee for legal representation. It’s kind of like “there’s no crying in baseball”.

Consider your customary hourly fee. Consider the difficulty of the case, and the client. Set the fee accordingly.

(b) Rule 2

Current cash flow problems in the office are temporary in nature and far less troublesome than spending many hours working for a client who is going to pay “next week”, but never does.

Get a reasonable retainer up front and require the client to maintain a minimum fee deposit with your office at all times.

If the client can’t pay the retainer, don’t take the case.

(c) Rule 3

Do not become the banker who finances your client’s family law litigation.

If the client violates the fee agreement, withdraw promptly. You owe your client a duty to represent him or her zealously until you withdraw. Failure to withdraw promptly only exposes you to financial loss in the form of providing free legal services or professional loss if you fail to withdraw and fail to properly represent the client fully.
These rules are absolute. If you adopt them early in your practice and follow them faithfully, you will never regret it.

If you fail to follow them, as most of us do at some point in our careers, you will be reminded that failure to follow them creates financial problems for you, and subjects you to anxiety and other emotional distress.

Save yourself the trouble and follow the rules.
# NEW CLIENT DATA SHEET

**NAME:**

**ADDRESS:**

**COUNTY OF RESIDENCE:**

**PHONE:** HOME (_____) SS #

**CELL/PAGER** (______) DRIVER’S LIC. #

**WORK** (______) WORKING ADDRESS:

**BILLING ADDRESS:**

**ADVERSE PARTY or MATTER:**

**BILLING CYCLE:** (Check one) [ ] Monthly  [ ] Quarterly  [ ] Annually (Year End)  [ ] Upon Completion  [ ] Retainer  [ ] Criminal Appointment  [ ] Pro Bono  [ ] Expenses Only

**ORIGINATING ATTORNEY:**

**CONFLICT OF INTEREST INDEX CHECKED BY:**

**RESULTS REFERRED TO:**

**COMMENTS:**

**AREA OF PRACTICE:** (Enter 2 digit Code)

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**For Office Use Only**

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Received By:

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9
APPENDIX A (Cont’d)

FAMILY LAW CLIENT INFORMATION SHEET

DATE: __________________________

WIFE’S INFORMATION
WIFE’S NAME: ____________________________________________________________
Maiden Name: ____________________________________________________________
Social Security Number: ____________________________________________________
Date of Birth: ______________ Place of Birth: _________________________________
Present Address: __________________________________________________________
_________________________________________ Home Phone #: (______)__________
Employer’s Name and Address: _____________________________________________
_________________________________________ Work Phone #: (______)___________
Driver’s License #: ______________________ State Issued: _______________________

HUSBAND’S INFORMATION
HUSBAND’S NAME: _________________________________________________________
Social Security Number: ____________________________________________________
Date of Birth: ______________ Place of Birth: _________________________________
Present Address: __________________________________________________________
_________________________________________ Home Phone #: (______)__________
Employer’s Name and Address: _____________________________________________
_________________________________________ Work Phone #: (______)___________
Driver’s License #: ______________________ State Issued: _______________________

MARRIAGE INFORMATION
DATE OF MARRIAGE: _________________________________________________________
PLACE OF MARRIAGE: Town: __________________________ State: ___________________
DATE OF SEPARATION: _______________________________________________________

CHILDREN’S INFORMATION (Please give full names, NO NICKNAMES)
NAME: ________________________ NAME: ________________________
[ ] Male [ ] Female [ ] Male [ ] Female
Birthdate: ______________ Birthdate: ______________
Birthplace: ______________ Birthplace: ______________
Present Residence: ______________ Present Residence: ______________
S. S. No.: ___________________ S. S. No.: ___________________

NAME: ________________________ NAME: ________________________
[ ] Male [ ] Female [ ] Male [ ] Female
Birthdate: ______________ Birthdate: ______________
Birthplace: ______________ Birthplace: ______________
Present Residence: ______________ Present Residence: ______________
S. S. No.: ___________________ S. S. No.: ___________________

HAVE YOU BEEN PREVIOUSLY MARRIED? [ ] Yes [ ] No
If yes, please complete the following:
Former Spouse’s Full Name: ________________________________________________
County and State in which divorce obtained: _________________________________
Can you furnish a copy of the divorce decree? [ ] Yes [ ] No
(Repeat above information for other prior marriages on the reverse side)
MONTHLY INCOME AND EXPENSES

MONTHLY GROSS INCOME (WAGES, SALARY, ETC.) $_______

Withholdings:
- Social Security $_______
- Medicare $_______
- Withholding $_______
- Health Insurance $_______
- Life Insurance $_______

Net Pay $_______

Other Sources of Income:

TOTAL FUNDS AVAILABLE TO PAY EXPENSES $_______

EXPENSES:
- Mortgage/Rent $_______
- Electricity $_______
- Natural Gas $_______
- Water/Sewer/Garbage $_______
- Cable Service $_______
- Telephone (basic) $_______
- Telephone (Long distance) $_______
- Automobile Payments
  1. Husband’s $_______
  2. Wife’s $_______
- Automobile Insurance $_______
APPENDIX B (Cont’d)

Life Insurance $_______
Gasoline $_______
Groceries $_______
School lunches $_______
Daycare $_______
Clothing (Adults) $_______
Clothing (Children) $_______
Medical Care (Adults) $_______
Medical Care (Children) $_______
Club Memberships $_______

Credit Cards (minimum monthly payments)
1. ____________________ $_______
2. ____________________ $_______
3. ____________________ $_______
4. ____________________ $_______
5. ____________________ $_______

Other:
________________ $_______
________________ $_______

NET DISPOSABLE INCOME <SHORTFALL> $_______