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OFFICE CONSULTATION – \$285.00

Appointment Date: _____ Appointment Time: _____

Should you need to reschedule your appointment, please contact our office 24 hours prior to your appointment.

HOW WERE YOU REFERRED TO OUR OFFICE? () FRIEND _____ (name)
() INTERNET: _____ (search engine?) () WEBSITE
() I AM A PAST CLIENT _____ (year) () ATTORNEY _____ (name)

CLIENT:

NAME: _____ / _____ / _____
(FIRST) (MIDDLE) (LAST) (DOB) (CDL#)

ADDRESS: _____
(STREET) (CITY) (ZIP CODE) (COUNTY)

MAILING ADDRESS: _____
(ONLY IF DIFFERENT FROM ABOVE) (STREET) (CITY) (ZIP CODE) (COUNTY)

HM PH: _____ WK PH: _____ CELL PH: _____
(INCLUDE AREA CODE)

E-MAIL: _____

SPOUSE:

NAME: _____ / _____ / _____
(FIRST) (MIDDLE) (LAST) (DOB) (CDL#)

ADDRESS: _____
(STREET) (CITY) (ZIP CODE) (COUNTY)

MAILING ADDRESS: _____
(ONLY IF DIFFERENT FROM ABOVE) (STREET) (CITY) (ZIP CODE) (COUNTY)

HM PH: _____ WK PH: _____ CELL PH: _____
(INCLUDE AREA CODE)

E-MAIL: _____

EMERGENCY CONTACT NAME/NUMBER: _____

PREFERRED METHOD OF COMMUNICATION:

() HOME * () BUSINESS () CELL * () E-MAIL * () WRITTEN
* YOUR RIGHT TO PRIVACY MAY BE ADVERSELY AFFECTED. PLEASE DISCUSS WITH ATTORNEY

I WOULD LIKE TO DISCUSS: (REASON FOR VISIT)

PARTIES

(OTHER PERSON OR ENTITY WHO IS INVOLVED IN YOUR MATTER OR CASE)

PARTY 1:

NAME: _____ / _____ / _____
(FIRST) (MIDDLE) (LAST) (DOB) (CDL#)

ADDRESS: _____
(STREET) (CITY) (ZIP CODE) (COUNTY)

PHONE: _____ (INCLUDE AREA CODE)

PARTY 2:

NAME: _____ / _____ / _____
(FIRST) (MIDDLE) (LAST) (DOB) (CDL#)

ADDRESS: _____
(STREET) (CITY) (ZIP CODE) (COUNTY)

PHONE: _____ (INCLUDE AREA CODE)

PARTY 3:

NAME: _____ / _____ / _____
(FIRST) (MIDDLE) (LAST) (DOB) (CDL#)

ADDRESS: _____
(STREET) (CITY) (ZIP CODE) (COUNTY)

PHONE: _____ (INCLUDE AREA CODE)

GENERAL CASE INFORMATION

WHERE DID YOUR DISPUTE TAKE PLACE (CITY, STATE, AND COUNTY?) _____

HAVE YOU BEEN SERVED WITH ANY DOCUMENTS? () YES () NO.
(IF YES, PLEASE GIVE TO THE LEGAL ASSISTANT TO COPY SO THE ATTORNEY MAY REVIEW)

DATE YOU WERE SERVED _____ METHOD: () BY MAIL () PERSONALLY

DOES THE OTHER PARTY HAVE AN ATTORNEY? () YES () NO

ATTORNEY NAME/ ADDRESS/PHONE: _____

HAVE YOU COMMUNICATED WITH THE OTHER PARTIES ATTORNEY? () YES () NO

HAVE YOU PREVIOUSLY CONSULTED YOUR OWN ATTORNEY? () YES () NO

ATTORNEY NAME/ADDRESS/PHONE: _____

FINANCIAL INFORMATION

YOUR EMPLOYER NAME/ADDRESS: _____

DATE FIRST STARTED WORKING FOR ABOVE: _____

SALARY: () ANNUAL \$ _____ () MONTHLY \$ _____

OTHER PARTY EMPLOYER NAME/ADDRESS: _____

HOW LONG AT ABOVE EMPLOYER?: _____ YEARS _____ MONTHS

DO YOU () OWN OR () RENT HOME?

DO YOU HAVE ANY JUDGMENTS AGAINST YOU? () YES () NO

HAVE EITHER YOU OR YOUR SPOUSE FILED BANKRUPTCY IN THE LAST TEN YEARS? () YES () NO

IF YES, WHAT DATE WAS THE FINAL DISCHARGE? _____

RESOLUTION

WHAT RESULTS WOULD YOU LIKE TO HAVE?

RESULT #1 _____

BY WHAT DATE? _____

RESULT #2 _____

BY WHAT DATE? _____

RESULT #3 _____

BY WHAT DATE? _____

ATTORNEY CLIENT RELATIONS

WHAT IS YOUR PREFERRED METHOD OF COMMUNICATION?

ATTORNEY EMAIL POLICY

I HAVE REVIEWED THE BELOW FIRM EMAIL POLICY () YES () NO

Attorney Email Policy

Client may limit their attorney fees by budgeting meetings, emails, and telephone calls with the Attorney as their budget may accommodate as the Attorney estimates the retainer deposit on the preparation by Attorney of required legal documents for the scope of work and based on the client's initial disclosures. Attorney is often not immediately available by telephone or email. Attorney will not answer the phone when she is with a client or in Court, in a deposition or in a meeting. When Attorney is unavailable, the telephone is answered by voice mail, which is checked during business hours by staff. Attorney will make every effort to return Client's call within 48 hours, with the exception of weekends and holidays. If you are difficult to reach, please leave some times when you will be available. If Attorney is unavailable for an extended time, she will provide you with the name of a trusted colleague whom you can contact if necessary. **Attorney's business hours are Monday, Tuesday and Thursday 9:00 a.m. – 5:00 p.m. and Friday 9:00 a.m. – noon. Wednesdays and Friday afternoons are work production times.** Attorneys and Paralegals are available after hours for emergencies on a RUSH basis as set forth in the Attorney Client Retainer Agreement, if engaged to represent you.