

# OWENS, PINZELIK, WOOD & SCHAFF, P.C.

MAIN:  
RIVER FORUM I  
4380 SW MACADAM AVENUE, SUITE 590  
PORTLAND, OREGON 97239

SATELLITE OFFICES:  
SE PORTLAND  
VANCOUVER, WA

DAVID W. OWENS†‡  
JOHN A. PINZELIK†‡  
BROOK D. WOOD†  
CHAD E. SCHAFF†‡  
JENNIFER L. PECKHAM†  
†LICENSED IN OREGON  
‡LICENSED IN WASHINGTON

JEANIE BREWER  
VICTORIA TIMBROOK  
PARALEGALS

## NEW BUSINESS ENTITY CLIENT INFORMATION SHEET

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

Client Entity's Formal Name: \_\_\_\_\_ Entity Type: \_\_\_\_\_

Trade Names or DBA's: \_\_\_\_\_

State of Organization: \_\_\_\_\_ Other States Doing Business In: \_\_\_\_\_

Principal Address: \_\_\_\_\_ City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Contact Person: \_\_\_\_\_ Title/Position: \_\_\_\_\_

Phone Numbers: Office \_\_\_\_\_ Cell \_\_\_\_\_ Email: \_\_\_\_\_

How did you hear about our office? (Check only one, please.)

- |  |   |
|--|---|
| <input type="checkbox"/> Firm website ( <a href="http://www.davidowenslaw.com">www.davidowenslaw.com</a> ) | <input type="checkbox"/> High school sports program or ad |
| <input type="checkbox"/> Findlaw.com   | <input type="checkbox"/> The Academy Theater              |
| <input type="checkbox"/> Avvo.com  | <input type="checkbox"/> An OSPW client (Name: _____)     |
| <input type="checkbox"/> Yelp.com  | <input type="checkbox"/> Another attorney (Name: _____)   |
| <input type="checkbox"/> From a professional referral service  | <input type="checkbox"/> Other: _____                     |

What type of legal matter are you here to discuss? \_\_\_\_\_

Who is the opposing party? \_\_\_\_\_ Opposing attorney? \_\_\_\_\_

Is there a court appearance or other deadline approaching? Y N Date: \_\_\_\_\_

What is that deadline? \_\_\_\_\_

**PLEASE NOTE: There is an \$100.00 fee for first half-hour of initial conferences, which is due at the time of the consultation. Following the first half-hour, all time is billed at our normal applicable rates and due within ten (10) days. We generally do not bill a fee for consultation regarding bankruptcy, personal injury, and wage & hour claims.** If you are unsure about whether you are required to pay a fee, or the amount of the fee, please ask the attorney meeting with you at the beginning of the conference. This office accepts payment in cash, check, or VISA/Mastercard. Discussion of your case with this office, and/or payment for the initial consultation does not constitute acceptance of representation by this office or by the client. Prior to the commencement of representation the attorney will present a separate fee agreement to client, which the client must sign to formalize the attorney-client relationship.

How will you be paying today? Cash \_\_\_ Check \_\_\_ Credit/Debit \_\_\_