

# CLIENT INFORMATION

Date: \_\_\_\_\_

Legal Name: \_\_\_\_\_

Preferred First Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

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

City, State, Zip: \_\_\_\_\_ County: \_\_\_\_\_

Marital Status: \_\_\_\_\_ Social Security Number: \_\_\_\_\_

Best phone number to call: \_\_\_\_\_  Home  Cell  Work

Alternate phone number: \_\_\_\_\_  Home  Cell  Work

Email: \_\_\_\_\_ Occupation: \_\_\_\_\_

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

Preferred First Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Best phone number to call: \_\_\_\_\_  Home  Cell  Work

Alternate phone number: \_\_\_\_\_  Home  Cell  Work

Email: \_\_\_\_\_ Occupation: \_\_\_\_\_

Nature of Matter to be Discussed: \_\_\_\_\_

## Referred by:

Individual (name): \_\_\_\_\_

I am a client of: \_\_\_\_\_ Niehaus Financial Services \_\_\_\_\_ Niehaus Tax Services

Other: \_\_\_\_\_ Church Bulletin \_\_\_\_\_ Office Sign

\_\_\_\_\_ Website \_\_\_\_\_ Other: \_\_\_\_\_

**FEE NOTICE:** I understand that I will be charged for this meeting / consultation, either at an hourly rate or by a fee for any legal documents prepared.

\_\_\_\_\_  
Client Signature