OPENING CASE MEMO

Memo Date {{ format\_date(today()) }}

Client Name {{ client.name.full() }} Client Address: {{ client.address.address }} {{ client.address.city }}, {{ client.address.state }} {{ client.address.zip }}

Client Phone Number: {{ client.phone\_number }}

Client Email: {{ client.email }}

Client Income

|  |  |  |
| --- | --- | --- |
| {%tr if jobs.there\_are\_any == True %} |  |  |
| {%tr for source in jobs %} |  |  |
| {{ source.name }} | {{ source.value }} | {{ source.period }} |
| {%tr endfor %} |  |  |
| {%tr endif %} |  |  |
| {%tr if non\_job\_income.there\_are\_any == True %} |  |  |
| {%tr for source in non\_job\_income %} |  |  |
| {{ source.name }} | {{ source.value }} | {{ source.period }} |
| {%tr endfor %} |  |  |
| {%tr endif %} |  |  |

Client Problem Statement:

{{ client\_problem\_statement }}

Type of Case: Opposing Party:

Form 1 Date:Reviewed By:

Case Acceptance Date:

1. Summary of facts:
2. Who or what is the opposing party and who is their counsel, if they have counsel?
3. Are there any events (i.e. garnishment, foreclosure etc.) or court proceedings happening at this time? If so, what event, which court if applicable, what case number, and date and name of event for next event:

1. Client’s desired goal and if you do not think this is a reasonable goal, your reasons:

1. Possible issues (e.g., child support, visitation, etc.)
2. Is there a court event at this time? If so, what event, which court if applicable and date for next event
3. Any other information the client wanted to share or thought important for us to know?

1. Possible problem areas (e.g., domestic violence, working “under the table”, client has substance use issues or other health issues, etc.):

1. What further information or investigation is needed:
2. Legal research necessary to prepare case:

1. Impact potential, if any, and how to pursue:

1. Do you recommend we accept case? (and why or why not)
2. What further information or investigation is needed?