

General Intake Information Sheet



Thank you for choosing to consult with the CGA Law Firm. To ensure your file and records may be complete, we would appreciate it if you would fill out this General Intake Information Sheet. Thank you.

Date: _____

Name:

Spouse's Name:

Last First Middle

Last First Middle

I acknowledge receipt of CGA Law Firm's "Financial Arrangements with Clients" notice which governs payment of fees and costs including fees for the initial consultation and the "Notice Concerning Privacy and Confidentiality of Information".

Client _____ Client _____

Check if you have a disability for which you require an accommodation in order to receive legal services.
Explain: _____

Address:

Address:

Street

Street

City State Zip Code

City State Zip Code

Township/Borough: _____

Township/Borough: _____

Telephone: Check preferred method of contact

Telephone: Check preferred method of contact

Home: _____

Home: _____

Work: _____

Work: _____

Cell: _____

Cell: _____

Fax: _____

Fax: _____

E-Mail Address: _____

E-Mail Address: _____

Date of Birth: _____

Date of Birth: _____

Social Security No.: _____

Social Security No.: _____

Employer Information:

Employer Information:

Name: _____

Name: _____

Street Address

Street Address

City State Zip Code

City State Zip Code

Occupation: _____

Occupation: _____

General Intake Information Sheet



How Did You Hear About CGA Law Firm? (Check All That Apply)

Referred by: friend relative attorney If so, whom may we thank? _____

Newspaper: _____ Internet/Website: _____ Event/Community Involvement: _____

Verizon Yellow Pages: _____ YellowBook: _____ Other: _____

One firm, all the law you need. SM

CGA Law Firm provides a broad range of legal services to businesses and individuals throughout Central Pennsylvania. Our attorneys are experts in their areas of practice enabling CGA Law Firm to stay current with changes in the law. Please check all practice areas for which you would like to receive information. And when the need arises we hope that you will contact us for your future legal matters.

_____ Bankruptcy and Debtor/Creditor Rights

_____ Corporate and Business Law

_____ Domestic and Family Law

_____ Employment and Labor Law

_____ Estate Planning and Administration

_____ Intellectual Property

_____ Litigation

_____ Municipal Law

_____ Real Estate Law

_____ Education Law

_____ Taxation

Electronic Mail Delivery

CGA Law Firm sends communications in the form of newsletters, alerts, seminars and articles through electronic mail delivery. By providing your email address to CGA Law Firm, you consent to receiving communications via email.

Check here if you prefer not to receive such communications through electronic mail delivery.

All emails of this nature will provide an easy and free means by which you may opt-out of future communications should you desire.

Additional Information to be Completed by Attorney

Name of Adverse Party, if any: _____

Additional Affiliated Parties: _____

Financial Arrangements with Clients



1. Fees. Many factors are taken into account in billing for our services, including the hourly billing rates of the lawyers and paralegals who work on the matter, the novelty and complexity of the issues involved, the urgency with which the services must be performed, the extent to which an undertaking precludes us from representing other clients and the results achieved. In most instances, the number of hours spent by professional personnel is the principal basis for our fees. However, there are exceptions to this general rule. For example, legal services in connection with residential real estate are based upon a flat or fixed rate. In addition, there are separate legal fees billed for the preparation of certain documents, such as deeds, agreements, leases, etc., which fees are also normally billed at a fixed or flat rate. All of these fixed or flat rate fees may vary from time to time and will be provided to you upon request. In the case of some litigation matters the fee is based upon a percentage of the amount recovered, and we are required to enter into a written contingent fee agreement with the client specifically setting forth such percentages. In the case of some estates, our legal fees are based upon a percentage of the value of the probate assets. In that instance, you will be provided with a more detailed statement outlining the basis of the calculation of our fee.

2. Initial Consultations. There are charges for initial consultations. They vary from attorney to attorney. They are based on a number of factors. Please be sure to discuss the cost of your initial consultation with the attorney who you are meeting. Normally, the initial consultation fee is paid at the time of the consultation.

3. Hourly Billing Rates. Our hourly billing rates vary, depending upon the training and experience of the person doing the work, and may change from time to time. The current rates will be provided to you upon request.

4. Disbursements. Most engagements require that certain advances be made on your behalf by the firm from time to time. Out-of-pocket expenses for travel, long distance telephone calls, filing fees, postage, overnight delivery, photocopying, and similar items will be separately billed and identified on our statements. As a result of delays in billings to our office, we may not bill certain disbursements on the statements on which related services are billed.

5. Periodic Billings. Unless we have made other arrangements, it is our policy to render monthly statements for professional services. Usually we prepare and mail statements during the beginning of the month following any month in which substantial services have been rendered and/or disbursements have been incurred. We expect that our statements will be paid upon presentation, but in any event, within 30 days after you receive the statements.

6. Administrative Charge. In the event our statements for fees and disbursements are not paid within 30 days after you receive them, we reserve the right to impose a Finance Charge at the maximum rate allowed by law on the balance due to help defray the additional cost of carrying and administering delinquent accounts. In addition, any legal fees associated with collection efforts will be added to your Total Charge.

7. Retainer Against Fees. It is the policy of our firm to require the payment of a retainer in connection with any litigation, bankruptcy, domestic relations matter, or certain other matters. As time is spent by our staff and disbursements are made in connection with a client matter, monthly or periodic statements will be submitted to you showing the amount that has been deducted from the retainer, and you will be expected to make such payment as may be necessary to bring the retainer back up to its original amount.

8. Funds Held in Escrow. During the course of our engagement, we may have occasion to hold funds in escrow on your behalf. We reserve the right to apply funds held in escrow to pay outstanding billings for services and disbursements before remitting the balance to you.

9. Termination. You may terminate our representation in a matter at any time. We have the same right, subject to our obligation to give you reasonable notice to arrange alternative representation.

We urge you to read this information carefully and to discuss any questions that you may have regarding the basis or calculation of our fees for legal services with the attorney involved during your initial consultation. We feel that it is important that both parties have a clear understanding of the legal costs that may be involved in order to avoid any misunderstanding or surprise.

If you do not agree with any or all of the terms set forth in this letter, you must provide us with written notice of the dispute within thirty days from your initial consultation. CGA Law Firm is committed to providing both unparalleled client service and quality legal counsel. If at any time you have concerns regarding your bill or your case, please contact the firm's legal administrator, Kerri L. Cassel. She can be reached at (717) 848-4900 ext. 101 or by email at kcassel@cgalaw.com.



Lawrence V. Young
Sharon B. Myers
Thomas D. O'Shea
Frank H. Countess
Jeffrey L. Rehmeier II
Craig S. Sharnetzka
Timothy J. Bupp
Brent C. Diefenderfer
Margaret W. Driscoll
Jack M. Hartman
Leanne M. Miller
Zachary E. Nahass
Devon M. Myers
Richard K. Konkel
John C. Uhler *
Hunter B. Schenck
Evan M. Gabel
Christine E. Neutwig
Rebecca M. Shanaman
Robert M. Strickler
Peter D. Solymos
Charles B. Calkins
Stephen R. McDonald
E. Haley Rohrbaugh
Renée E. Franchi
Liliana Garcia

Of Counsel:

Gary M. Gilbert
Peter R. Andrews
John D. Flinchbaugh
Rees Griffiths
John S. Kennedy *
Joseph P. Clark, II
Andrew M. Paxton
Tina H. Fox

Jon C. Countess (1964-2014)

* Retired Pennsylvania
Court of Common Pleas
Judge

NOTICE CONCERNING PRIVACY AND CONFIDENTIALITY OF INFORMATION

Attorneys, like other professionals who advise on personal financial matters, are now required by a new federal law to inform their clients of their policies regarding privacy of client information. Attorneys have been and continue to be bound by professional standards of confidentiality that are even more stringent than those required by this new law. Therefore, we have always protected your right to privacy.

In the course of providing our clients with income tax, estate tax, and gift tax advice, we receive significant personal financial information from our clients. If you are a client of **CGA Law Firm**, you should know that all information we receive from you is held in confidence, and is not released to people outside the firm, except as agreed to by you or as required under an applicable law.

We retain records relating to professional services that we provide so that we are better able to assist you with your professional needs and, in some cases, to comply with professional guidelines. In order to guard your non-public personal information, we maintain physical, electronic, and procedural safeguards that comply with our professional standards.

Please call if you have any questions, because your privacy, our professional responsibility, and the ability to provide you with quality legal services are very important to us.