

**STEVEN A. HEINRICH, Ph.D.**

*Attorney at Law*

Client Information Form

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Date \_\_\_\_\_

Name \_\_\_\_\_ SS# \_\_\_\_\_

Address \_\_\_\_\_  
Street City Zip

May we send mail to this address?  Yes  No (If you check "No", please provide another address under "Billing Address" below, or the above address will be used.)

Phone (best) \_\_\_\_\_ (work) \_\_\_\_\_ (message or alt) \_\_\_\_\_

Employer \_\_\_\_\_ Date of Birth \_\_\_\_\_

Spouse's name \_\_\_\_\_ SS# \_\_\_\_\_

Employer \_\_\_\_\_ Date of Birth \_\_\_\_\_

Former married/maiden names: (Client) \_\_\_\_\_ (Spouse) \_\_\_\_\_

Billing Address (if different from above) \_\_\_\_\_

Emergency Contacts:

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Telephone \_\_\_\_\_

This visit is regarding: \_\_\_\_\_

Other people with an interest in this legal matter, property or issue: (i.e. co-owner of property, officers of small business, etc.)  
\_\_\_\_\_

Likely opponent(s) in this matter: \_\_\_\_\_

Have you been a client of this office previously? \_\_\_\_\_

I found this office through/was referred by:

Web Site  Yellow Pages

Friend (name) \_\_\_\_\_

Other Attorney \_\_\_\_\_  Other \_\_\_\_\_

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I understand and agree as follows. A privacy policy follows as page 2, and a copy of this has been received by me. Charges of \$125 per hour for the first hour and \$250 per hour thereafter, calculated in 1/10 hour increments, will apply to the initial conference. All later matters, including letters and telephone calls, will be charged at \$250 per hour unless otherwise agreed in writing with the attorney. Payment for the initial conference will be paid by me at the time of service. I will be paying for the initial conference by cash, or by check. Work performed after the initial conference, including letters sent thereafter, including in most cases a letter to me confirming and/or reviewing matters discussed in the initial conference, may be billed separately.

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

## **PRIVACY POLICY**

*Attorneys who provide legal services involving their clients' financial matters are now required by federal law to inform those clients of their policies regarding the privacy of client information. The purpose of this notice is to explain what we will be doing with the financial information that you provide to us and how we will protect your privacy.*

*Oregon attorneys are bound by the Oregon Rules of Professional Conduct. This Rules of Professional Conduct governs our conduct and requires us to protect your confidentiality. These professional standards are even more stringent than those now required by federal law. Therefore, we have always protected your right to privacy and will continue to do so. Federal law now also requires that we let you know how we are protecting your privacy.*

### ***Types of Nonpublic Personal Information We Collect***

*We collect nonpublic personal information about you that is provided to us by you or obtained by us in order to provide you with the legal services you have requested. In some cases, this information includes details about your personal finances and property.*

### ***Disclosure of Information***

*We disclose nonpublic personal information about you only to individuals or entities necessary in order to provide you with the legal services that you have requested. For instance, our staff may have access to your nonpublic personal information in order for us to efficiently provide you with the legal services you have requested. In some situations we may provide information to another organization (such as your accountant, realtor, or insurance company) in order to obtain information or assist in providing the legal services you have requested.*

*We do not disclose any nonpublic personal information about you to anyone, except as is necessary in order to provide you with the legal services that you have requested. The only disclosures we make are those that are permitted by law and by the Oregon Rules of Professional Conduct.*

### ***Your Privacy Is Important to Us***

*We retain records and files relating to the professional services you have asked us to provide. In order to guard your nonpublic personal information, we maintain physical, electronic, and procedural safeguards that comply with the Rules of Professional Conduct that governs our profession. Please call us with any questions you have about protecting your privacy.*