

Attorney Legal Case Intake Form – Prior to purchase of service

(Expert Witness Services)**

Section 1 — Attorney / Law Firm Information

- Attorney Name: _____
- Law Firm: _____
- Title / Role: _____
- Email Address: _____
- Direct Phone Number: _____
- Firm Address: _____
- Preferred Method of Contact: Phone / Email

Section 2 — Case Identification

- Case Name / Reference: _____
- Court Case Number (optional): _____
- Case Type: Plaintiff or Respondent
- Jurisdiction (City/State): _____
- Case Status: Pre-litigation / Active litigation / Administrative action / Appeal / Mediation
- Filing Deadlines or Time-Sensitive Requirements (if any): _____

Section 3 — Parties Involved

(Do not include confidential or sensitive details beyond what is necessary to identify the parties.)

- Client / Represented Party (Optional): _____
- Opposing Party / Facility / Entity (Optional): _____
- Additional Parties (if applicable): _____

Section 4 — Nature of the Matter

(High-level description only. Do not upload confidential records at this stage.)

Brief Summary of the Issue: _____

This image shows a blank sheet of white paper with horizontal ruling lines. The lines are evenly spaced and run across the width of the page. There are no margins, text, or other markings on the paper.

- Primary Questions or Areas Where Expert Assistance Is Requested:
 - Gaps in Regulatory Interpretation
 - Standard of Care Expert Analysis Report of which include Review of Records
 - Testimony
 - Other (describe):

Section 5 — Additional Notes

Other information you believe is relevant for determining scope and suitability:

Acknowledgment

By submitting this form, you acknowledge the following:

- This intake form is used solely for the purposes of initial contact, verifying review of the FAQ, confirming acceptance of the Terms and Conditions, and documenting internal notes necessary to determine whether the matter is appropriate for expert-witness services.
- Submission of this form does not create an expert-witness relationship or guarantee availability.
- Confidential or sensitive records should not be submitted until formally requested following conflict-of-interest clearance, security measures, and execution of a service agreement.
- By proceeding to purchase any service, you affirm that you have reviewed the FAQ and accepted the Terms and Conditions in full.

Print Name: _____

Law Firm: _____

Signature: _____