



# JOHNSON-GILCHRIST LAW FIRM, PC

ATTORNEYS AND COUNSELORS AT LAW

Paula M. Johnson-Gilchrist

Sean R. Gilchrist

Matthew D. Neill

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## INITIAL CONSULTATION AGREEMENT

To: Potential Clients

From: Johnson-Gilchrist Law Firm, P.C.

Re: Initial Consultation

### SERVICES, FEES & CHARGES and TERMS

You have requested we meet with you for an initial consultation only. Our comprehensive initial consultation is provided at the hourly rate of \$250/hr. for Paula Johnson-Gilchrist, Sean R. Gilchrist and Matthew D. Neill payable upon time of service. The purpose of the initial consultation and scope of our employment for the initial consultation is limited to:

- Reviewing your current marital and/or parenting situation;
- Reviewing your asset (property) and liability (debts) structure;
- Reviewing your income and expenses;
- Discussing your problems, concerns, and goals for resolving marital and/or parenting problems;
- Explaining solutions, costs, and pros and cons of your choices in addressing your problems.

Anything you tell us during the initial consultation is confidential under the attorney/client privilege. It is important that you honestly and frankly share with us all of the details of your marital, parenting, and financial situation. Please remember that we do not represent you on anything other than an initial consultation until you expand the scope of our employment and until we sign a written fee agreement for that purpose.

Our future services, fees & charges, and terms are set forth in our Attorney-Client Engagement letter for your review. Any fee estimate we provide during the initial consultation is subject to the same limitation as our "advice" as follows:

Our legal opinions fall into two types: a) "**advice**" based on our general knowledge of the law & our experience; and b) "**opinions**" expressed in writing and signed by us. "**Advice**" is merely guidance, should not be relied upon and does not provide the same level of assurance as an "opinion." "**Opinions**" are provided only after a full factual investigation and adequate legal research. Although we give you advice on various aspects of your case, including cost and fee estimates, we have offered no opinions and make no guarantee or warranties as to the successful outcome of the case or the aggregate cost.

### **DUTIES TO PROSPECTIVE CLIENTS**

Montana Rule of Professional Conduct (MRPC) 1.20 provides specific duties that relate to prospective clients. In general, it states that if we receive information from you that could be significantly harmful to you, we may not represent another person with interests materially adverse in the same or a substantially related matter. You and we agree that your general and summary disclosure to me regarding: 1) your assets (property) and liabilities (debts) structure; 2) your income and expenses; 3) your marital and/or parenting concerns; and 4) your problems, concerns, and goals for resolving those problems will remain confidential.

AGREED & ACCEPTED: \_\_\_\_\_ DATE: \_\_\_\_\_

**DISSOLUTION OF MARRIAGE  
INITIAL WORKSHEET**

	<u>Client</u>	<u>Spouse</u>
Name	_____	_____
Other Names	_____	_____
Mailing Address	_____	_____
City, State, Zip	_____	_____
Residential Address	_____	_____
Home Telephone	_____	_____
Work Telephone	_____	_____
E-mail address	_____	_____
S.S.#	_____	_____
Driver's License #	_____	_____
Occupation	_____	_____
Employer	_____	_____
Address of Employer	_____	_____
Phone # of Employer	_____	_____
Birthdate	_____	_____
Race	_____	_____
Birthplace	_____	_____
Highest education completed	_____	_____
MT Resident since:	_____	_____
Number of this Marriage	_____	_____
Date of Previous Marriage	_____	_____
Place of Previous Marriage	_____	_____
Maiden Name	_____	_____
Restore Name?	_____	_____

**(Can you be contacted at the above phone number? \_\_\_\_\_)**  
**If not, provide alternate phone number \_\_\_\_\_**

This Marriage:                      City of \_\_\_\_\_ State of \_\_\_\_\_  
    County of \_\_\_\_\_  
    Date of this Marriage \_\_\_\_\_ Date of Separation \_\_\_\_\_

Children: Number Born Alive of this Marriage \_\_\_\_\_ Number under 18 \_\_\_\_\_  
    Number of other (prior) minor children in household      Client \_\_\_\_\_ Spouse \_\_\_\_\_

<u>Name</u>	<u>Date of Birth</u>	<u>SS No.</u>	<u>Sex</u>	<u>School</u>	<u>Age/Grade</u>
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____

Is Wife now pregnant? \_\_\_\_\_                      If yes, child of this marriage? \_\_\_\_\_  
 Is either party on assistance? \_\_\_\_\_                      (If so – give notice to CS&D!)

**SERVICE INSTRUCTIONS**

Description of Respondent	Height _____ weight _____ build _____ Eye color _____ hair color _____ Other distinguishing features such as tattoos, piercings, beard, mustache, etc. _____ Vehicle: _____
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	<u>Client</u>	<u>Spouse</u>
<b>Income:</b>		
W-2 or hourly	_____	_____
Social Security	_____	_____
Pension/Annuity	_____	_____
Business/self-employment	_____	_____
<b>Monthly Expenses:</b>		
Rent/Mortgage	_____	_____
Vehicles/Loans	_____	_____
Utilities	_____	_____
Food	_____	_____
Clothing	_____	_____
Student Loans	_____	_____
Transportation	_____	_____
Auto Insurance	_____	_____
Home Insurance	_____	_____
Health/Medical Insurance	_____	_____
Child Support	_____	_____
Other	_____	_____

<b><i>Assets, Debt &amp; Expenses:</i></b>	<i>Monthly Payment</i>	<i>Balance Owed On Debt</i>	<i>Current Value Of Asset</i>	<i>Wife or Husband Gets Asset</i>
Residence: Do you <input type="checkbox"/> own or <input type="checkbox"/> rent				
1 <sup>st</sup> Mortgage Creditor:				
2 <sup>nd</sup> Mortgage Creditor:				
3 <sup>rd</sup> Mortgage / Judgment lien Creditor:				
Car 1 - Year:    Make:    Model: Creditor:				
Car 2 - Year:    Make:    Model: Creditor:				
Car 3 - Year:    Make:    Model: Creditor:				
Boat - Year:      Model: Creditor:				
Trailer - Year:    Model: Creditor:				
Motorcycle - Year:    Model: Creditor:				
Other items of value over \$600.00				
Asset:            Creditor:				
Asset:            Creditor:				
Asset:            Creditor:				
Total Credit Card Debt				
Total Student Loan Debt				
Total Medical Debt				
Other Debt including personal loans				