

LAW OFFICES OF
RYAN REIFFERT
PLLC

Business Law, Business Transactions, Estate Planning, and Probate
(210) 817-4388 • info@ryanreiffert.com • ryanreiffert.com

SUBMITTING THIS QUESTIONNAIRE DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP

Getting Started — Tell Us About Your Situation

Not sure what you need? Start here.

This is the easy one

Answer a few quick questions and we will point you to the right next step — and, if helpful, send you a more detailed questionnaire for your specific matter. There are no wrong answers, and you can leave anything blank.

Like all of our forms, this questionnaire is intentionally “cookie-cutter” so that your legal services will not be.

PART 1: ABOUT YOU

Your name

Phone

Email

Best way to reach you

Best time to reach you

How did you hear about us?

Are you already a client of the firm?

☐ Yes ☐ No

PART 2: WHAT CAN WE HELP WITH?

Check anything that sounds like you (check as many as apply):

- ☐ Plan my estate (will, trust, powers of attorney)
- ☐ I lost a loved one and need help with probate / an estate
- ☐ Start a business or form an LLC/corporation
- ☐ Buy or sell a business
- ☐ Plan to pass on or transition a family business (succession)
- ☐ Protect my assets from future lawsuits or creditors
- ☐ Buy, sell, or lease real estate
- ☐ Draft or review a contract
- ☐ A non-disclosure agreement (NDA)
- ☐ Raise money / securities questions

List continues on the following page

- ☐ Tax planning
- ☐ Something else (tell us below)

In a sentence or two, what is going on and what would a good outcome look like?

PART 3: A FEW QUICK QUESTIONS

Is there a deadline, court date, or other time pressure?

☐ Yes ☐ No

If yes, what and when?

Have you been sued, served with papers, or received a demand or government notice?

☐ Yes ☐ No

● If you were just served with a lawsuit

Lawsuits have strict, short deadlines (often only a few weeks to respond). **Failure to respond within the timeframe can have disastrous consequences** (for example, *default*). If you have been served with a lawsuit, **please call us immediately at 210-817-4388**.

Please be aware that merely booking a consultation *does not* mean we have agreed to represent you in your lawsuit, and **does not count as a response to your lawsuit**. Unless/until we accept you as a client, **it remains your responsibility to timely respond to the lawsuit**.

Is anyone else involved (a spouse, co-owner, business partner, family member) whose interests might differ from yours?

☐ Yes ☐ No

If yes, who? (this helps us check for conflicts)

Roughly how soon do you want to move forward?

☐ Urgent — this week ☐ Soon — this month ☐ Planning ahead ☐ Just exploring

PART 4: ANYTHING ELSE

What happens next

Based on your answers, we will follow up and — when it makes sense — send a short questionnaire tailored to your matter (for example, our Estate Planning, Probate, Business Formation, Succession, Asset Protection, or Business Sale/Purchase questionnaires) so your first meeting is as productive as possible.

Anything else you would like us to know?

When you've finished

Please either bring this completed form to your meeting or email it back to us — preferably by replying to the email address you received it from. (Our general info@ryanreiffert.com inbox has heavy spam filtering, so a reply to your original sender is most reliable.)

If you have any questions, you are welcome to bring them to your consultation, call us, or ask by email.

THIS IS AN INTAKE QUESTIONNAIRE ONLY. COMPLETING OR SUBMITTING IT DOES NOT CREATE AN ATTORNEY-CLIENT RELATIONSHIP, WHICH BEGINS ONLY WHEN WE SIGN A WRITTEN ENGAGEMENT AGREEMENT. PLEASE DO NOT INCLUDE HIGHLY SENSITIVE INFORMATION UNTIL WE ARE FORMALLY ENGAGED.