

Louis A. Liberty, Esq.

Attorney at Law

1350 Old Bayshore Highway, Suite 610, Burlingame, CA 94010
Phone: (650) 341-0300 Fax: (650) 341-0302

PLEASE PRINT LEGIBLY & WITH AS MUCH DETAIL AS POSSIBLE.
PRINT OUT & ADD TO TOP OF YOUR VEHICLE DOCUMENTS.

POTENTIAL CLIENT INTAKE

LET CLIENT KNOW THIS CALL WILL BE RECORDED

DATE: _____

REFERRED BY: _____

TIME: _____

POTENTIAL CLIENT NAME: _____ CO-SIGNER NAME: _____

HOME NO: _____ CELL NO: _____ WORK NO: _____

HOME ADDRESS: _____

E-MAIL ADDRESS: _____

DO YOU WORK FOR A DEALERSHIP YES: NO:

IF YES, NAME OF DEALERSHIP _____

DID YOU PURCHASE IN CALIFORNIA? _____ DATE OF PURCHASE: _____

VEHICLE USED/NEW/MAKE/MODEL: _____

VEHICLE ID NUMBER# _____

DEALER NAME: _____

Address: _____

WHO FINANCED YOU? _____

Address: _____

DIRECT LOAN OR WENT THRU DEALER: _____ HAVE YOU RE-FINANCED VEHICLE _____

DID YOU MAKE A DOWN PAYMENT? _____ IF YES, HOW MUCH? _____

HOW? Check _____ Cash _____ Credit Card _____

IF BY CHECK, DID YOU POST DATE IT? _____ WHAT WAS THE DATE? _____

ARE YOU STILL MAKING YOUR MONTHLY PAYMENTS? _____

MONTHLY PAYMENT AMOUNT: _____ HOW MANY PAYMENTS HAVE YOU MADE? _____

DO YOU STILL HAVE VEHICLE? _____ CONDITION OF CAR? _____

CURRENT MILEAGE: _____ WAS THERE ANY OTHER VEHICLE INVOLVED? _____

If Yes, (Trade in year and model) (Bait & switch)? _____

PRIMARY LANGUAGE: _____

WHY ARE YOU CONTACTING US? _____

WHAT STEPS HAVE YOU TAKEN TO RETURN VEHICLE? _____

HAVE YOU SOUGHT LEGAL ADVICE FROM ANYONE ELSE BEFORE COMING HERE? _____

PLEASE SEND US THE FOLLOWING:

1. ALL DOCUMENTS FROM DEALERSHIP (meaning all contracts, & additional docs) YES: NO:
2. GO TO DEALER BASED ON AN AD? **If yes, provide.** YES: NO:
3. ALL RECEIPTS OF PAYMENT REPAIRS ETC.... YES: NO:
4. ALL CORRESPONDENCE FROM BANK, DEALER, AND DMV YES: NO:
5. PROOF OF ALL MONTHLY PAYMENTS AND DOWN PAYMENT: YES: NO:
6. REGISTRATION FROM YEAR OF PURCHASE: YES: NO:
7. ANY DMV REIMBURSEMENT? YES: NO:

PLEASE DO THE FOLLOWING:

8. IF YOU STILL HAVE THE CAR PLEASE BRING IN: (DAY OF APPT.) YES: NO:
9. CALL YOUR INSURANCE COMPANY AND ASK IF CAR WAS EVER IN AN ACCIDENT? YES: NO:
10. REQUEST A COPY OF THE REPORT TO BRING TO THE INTAKE CONSULTATION YES: NO:

1. (if not possible to bring car in please provide in digital form pictures as well as prints, showing the VIN, the plates, the odometer, the dash, the wheels, the exterior (all sides) and the interior, so that we can tell not only the vehicle condition but also the installed accessories.)

To streamline our intake process, please also include a type written sheet detailing the problems, and what steps have been taken. We will be contacting you as soon as we receive vehicle documents, to ensure attorney appointment can be set in a timely fashion.