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Client Intake Form Generator

Legal

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Generate a matter-specific client intake form for a law practice — sections for client details, matter facts, key dates, documents, opposite party, conflict check and fee and scope — plus documents to collect. Fill in the details below.

Purpose of this tool & output

Generate a matter-specific intake form

How the output is used

Use it to gather matter facts up front — a matter-specific client intake form that collects the details and documents you need.

Important cautions

AI-generated template; adapt to your firm process.

Companion documents

- Paralegal Task Procedure
- Case Brief / Headnote Generator
- Document Index / Paperbook Builder
- Due-Diligence Checklist Builder
- Legal Research Question Framer
- Billing / Time-Entry Narrative Helper

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.