

## INTERACTIVE INTAKE FORM:

Parameters: 30 questions (fields). Fields can allow up to 500 characters or 15-20 drop down selections.

NOTE: Goal of this interactive form is to gather general information and to direct people to the appropriate PDF form linked to the page.

We want the information submitted on the interactive form to go to [Marco@coloradoelderlaw.com](mailto:Marco@coloradoelderlaw.com).

We want this form to be useful to both new prospects navigating the site and prospects who have called us.

This page should contain the Contact Us link. Additionally, all places in the site that refer to a free initial consultation should jump to this page.

PDF Forms at bottom should include: Conservatorship/ Guardianship Intake, Public and Private Benefit Intake, Simple Estate Planning Intake, and Probate Intake.

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In order to maximize our time together at the initial free consultation, we ask that you take a moment to complete the questionnaire below and to complete the downloadable form that best corresponds to your legal issues.

**All answers are transmitted to us via a secured server. By answering this form, you are not establishing an attorney/client relationship with Chayet, Dawson & Danzo, LLC. An attorney/client relationship will only be established upon the signing of an engagement agreement for legal services after an in-person consultation with an attorney from Chayet, Dawson & Danzo, LLC. This electronic intake form is utilized by Chayet, Dawson & Danzo, LLC to determine whether or not our firm can assist you with your case.**

If you have not yet made your first appointment with us, please click Contact Us or call our office at 303.355.8500 or 866.873.6596.

1. Name
2. Address
3. Best Phone Number
4. Email
5. How did you hear about our firm?
6. When is your first appointment with us to discuss your case?
7. If you do not have an appointment scheduled with us, may we contact you to set an appointment?
8. Please provide a brief summary of why you are seeking legal counsel.
9. What are your goals in this situation?

10. Have you spoken to legal counsel on these issues before? If so, who?
11. What is your level of experience in working with attorneys? (Drop down: None, Some, Extensive)
12. Who is our appointment regarding (“subject person”)? Yourself, a loved one, your business?
13. Does the subject person have a Medical Power of Attorney?
14. Does the subject person have a Financial Power of Attorney?
15. Does the subject person have a Last Will and Testament
16. Does the subject person or couple have assets in excess of \$2,000,000?
17. In your lay opinion, is the subject person disabled or incapacitated?
18. Is the subject person a Veteran?
19. Does the subject person receive any public or private benefits such as SSDI, private disability payments, Medicaid, or Medicare? Please list all benefits being received or applied for.
20. Are there any legal proceeding pending or concluded before a court in this matter? If so, please include the name of the court and applicable case number.