



THE JOHNSON FIRM

— Attorneys at Law —

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ROSALIND B. JOHNSON, ESQ.
ATTORNEY & COUNSELOR AT LAW

LEGAL STRATEGY SESSION AGREEMENT & INTAKE FORM

Thank you for scheduling a Legal Strategy Session with the Johnson Firm. At the outset of any engagement, I believe it is appropriate to confirm in writing the terms of our engagement and what is the purpose of this Legal Strategy Session Agreement. Please read this Legal Strategy Session Agreement in full, initial beside each paragraph, and sign and date at the bottom. If you have any questions about this Legal Strategy Session Agreement or any of its provisions, do not hesitate to contact my office. Again, I am pleased to have the opportunity to serve you.

This is a Legal Strategy Session Agreement between you and Attorney Rosalind Johnson (hereinafter “Attorney”). For good and valuable consideration, the significance of which is hereby acknowledged, the parties agree as follows:

_____ ***Legal Strategy Session Fee.*** The fee for your Legal Strategy Session is **\$200.00**. Your Legal Strategy Session fee is to be paid online prior to your appointment time. **[You can click this link to make payment.](#)** During your Legal Strategy Session, the Attorney will review your intake form and discuss your case with you. If the Attorney decides to take your case and you retain the attorney during your strategy session, the Legal Strategy Session fee will be credited to the overall cost of your legal services, which effectively makes your Legal Strategy Session free. The Attorney will work with you to see if you qualify for a payment plan for the remainder of the fees due for the Attorney’s services if needed. All fees paid to the Attorney are deemed earned upon receipt and nonrefundable.

_____ ***Duty to be Open and Truthful.*** You must be open and truthful with the Attorney. It is important that you answer the Attorney’s questions fully and accurately because the Attorney will use the information to advise you and prepare your case and paperwork. Depending on your legal matter, the Attorney may provide you with an additional intake form to complete and return. You must answer all questions relevant to your case accurately and truthfully. Answering a question inaccurately may result in additional fees and inadequate legal advice. If a question does not apply to your particular situation, please indicate by writing “N/A”, which means “not applicable”.

_____ ***Confidentiality.*** The information disclosed to the Attorney will be held in confidence even if you do not retain the Attorney. The information disclosed to the Attorney are not to be disclosed to third persons other than those to whom disclosure is made in furtherance of the rendition of professional legal services.

_____ ***Waiver of Conflict.*** You hereby agree that should you not retain the Attorney, no

attorney-client relationship has been/will be established by filling out the intake form and/or meeting with the Attorney or any other member of the Johnson Firm to conduct a discussion of the facts of your case, obtain legal advice, and/or information. Without this relationship, the Attorney is not conflicted from representing another person in the same legal matter or some other legal matter which may be adverse to your interests.

_____ **No Guarantee.** The Attorney makes no guarantees in connection with the outcome of your case or the ultimate fees, court costs, and expenses to be paid. The Attorney does not know how much time the case will take, because the Attorney does not know what the disputed issues will ultimately be and how long negotiations or trial preparation will last. Your cooperation will help reduce the fees and costs. The Attorney will establish set procedures with you for conferences, telephone calls, and emergencies which will help reduce the fees and costs with your help. The Attorney agrees to provide conscientious, competent, and diligent services and at all times will seek to achieve solutions which are just and reasonable for you. However, because of the uncertainty of legal proceedings, the interpretation and changes in the law and many unknown factors, the Attorney cannot and does not warrant, predict or guarantee results or the final outcome of any case. Nothing in any Agreement between you and the Attorney nor in the Attorney's statements to you will be construed as a promise or guarantee about the outcome of your matter. The Attorney makes no such promises or guarantees. The Attorney's comments about the outcome of your matter are expressions of opinion only.

Signature of Prospective Client:

By signing below, you attest that you have read the above Legal Strategy Session Agreement in its entirety and agree to be bound by all of the terms and conditions in this Legal Strategy Session Agreement.

Printed Name: _____

Signature: _____

Date: _____

Thank you for completing this Legal Strategy Session Agreement. Please complete the attached Legal Strategy Session Intake Form. I look forward to meeting with you.

Sincerely,

Rosalind B. Johnson

Rosalind B. Johnson, Esq.

Legal Strategy Session Intake Form

The purpose of an initial consultation is for the attorney to advise you, the *prospective* client what, if anything, may be done for you, and what the minimum fee therefore will be. *The purpose is not to render a definitive legal opinion* as it may be impossible to fully assess a matter within the time frame allotted for a consultation or with the (information or documents) that you may be able to provide at the initial consultation.

One of three outcomes is possible following your consultation.

- A. You and the Attorney mutually agree to the terms of representation, or**
(After a separate document called an Agreement for Representation is signed, a copy will be provided to you.)
- B. The Attorney declines representation, or**
- C. You decide not to use the services of the Attorney.**

Note: The following questions will help us to understand the reason for your visit today. Your responses are protected by attorney/client privilege and will be held in strict confidence.

Name _____

Address _____
Number Street City State Zip

Home/Cell Phone (_____) _____ Email Address: _____

How did you learn of our office? A friend Facebook Letter Received
 Our Web Page Former client Legal Plan _____ Other _____
(Name of Legal Plan)

Legal plan referral number: _____ Last 4 of SS# _____
(ARAG Case assist/member number – HYATT Case number)

What area of legal service are you seeking assistance? (Check one or more)

____ Family Law (Divorce, Child Custody, Child Support, Etc) ____ Probate Administration
____ Bankruptcy (Chapter 7 or 13) ____ Estate Planning (Will, Power of Attorney
____ Business Matter (nonprofit setup, business formation) ____ Unbundled Services
____ Personal Injury (Auto Accident, Slip and Fall, Negligent Security) ____ Foreclosure
____ Real Estate Title & Closing Services ____ Landlord/Property Manager Representation

Is there a case currently pending? yes no County _____ Case#: _____

Have you been served with paperwork? yes no What date were you served? _____

Driver's License # _____ Last four of SS# _____

Are you known by any other names? [] Yes [] No

If yes what name(s) _____

(A fictitious name, a nickname, a former name, your maiden name etc.)

Where are you employed? _____

How are you paid [] weekly [] biweekly [] monthly [] other

May we contact you there? [] Yes [] No Phone No. (____) _____

PLEASE READ CAREFULLY & Sign Below

Following your initial interview, if you agree to hire the Attorney, and the Attorney agrees to represent you, you will both sign an Agreement for Representation. The Agreement for Representation will set forth the terms and conditions of representation.

If the Attorney is willing to represent you and you decide not to sign an Agreement of Representation today, you are strongly urged to schedule a second appointment with the Attorney at the earliest possible time or to immediately consult with other legal counsel to protect your rights.

***NOTICE:* This office does not represent you with regard to the matters set forth by you herein in this information sheet or discussed during your consultation, unless and until, both you and the Attorney execute a written Agreement for Representation.**

If the Attorney does not agree to represent you, this includes not representing you with regard to the matter set forth by you on this information sheet, or any other matters you may discuss with the Attorney during your consultation. If your legal problem(s) involve a potential lawsuit, it is important that you realize a lawsuit must be filed within a certain period of time called a Statute of Limitations. Therefore, the Attorney strongly urges you to *immediately* consult with another attorney to protect your rights. The Attorney's decision not to represent you should not be taken by you as an expression regarding the merits of your case.

Your signature acknowledges that you have read and understand the above statement and does not mean you have hired the Attorney.

SIGNATURE _____ Date ____/____/____

Return this completed document to our office prior to your appointment. It can be returned via email (info@johnsonfirm.com) or fax (407) 374-2897.