

LANDLORD/TENANT CASE/CLIENT INTAKE SHEET

How were you referred to our office? _____

Client Contact Name: _____

Client Phone:() _____

Client Address: _____

Alternate Phone:() _____

Client E-Mail: _____

Client Fax: () _____

Owner Name: _____

Owner Phone:() _____

Owner Spouse's Name: _____

Owner Information (LLC, LLP, Corporation, Trust, Single Person, Married Separate Property, Married Marital Community Property): _____

Tenant's Name(s): _____

Tenant's Marital Status: _____

Tenant Spouse's Name: _____

Tenant's SSN/DOB: _____

Is Tenant or Any Dependand of the Tenant in Active Duty or Reserve Military Service? Yes: _____ No: _____

Leasehold Address & Unit No.: _____

Lease Enter Date: _____

Lease Term From: _____ to _____

Are There Multiple Residence(s) at Property? Yes ___ No ___ Explain _____

Did the tenant(s) ever have an ownership interest in the property? Yes ___ No ___ Explain _____

Is the leasehold premises currently in and/or in threat of foreclosure due to non-payment? ___ Yes ___ No

Did the tenant complete a move in property condition checklist at the onset of tenancy? ___ Yes ___ No

Deposit Amount:\$ _____

Circle: Deposit (Security/Damage/Cleaning)

Monthly Rent Amount:\$ _____

Rent Due Date: _____

Rent Late After: _____

Late Fees:\$ _____

Rental Arrears: Date _____ \$ _____

Date _____ \$ _____

Date _____ \$ _____

Date _____ \$ _____

TOTAL:\$ _____

Tenant Default(s)/Basis for Action(Non Payment, Etc.): _____

Notice Served: _____

Notice Issue Date: _____

Manner of Service (Hand Delivered, Post and Mail): _____

Name of Client Contact Completing Form

Date

Signature

