

**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

EMS/jjl/rw/lkg