

# H&H Document Solutions

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## CLIENT INTAKE FORM

*(For Customized Contract Drafting & Professional Document Creation)*

**Business Name:** [Your Business Name]

**Contact Information:**

- Email: [Your Email]
  - Phone: [Your Phone Number]
  - Website: [Your Website]
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## SECTION 1: CLIENT INFORMATION

**Full Name:** \_\_\_\_\_

**Business Name (if applicable):** \_\_\_\_\_

**Email Address:** \_\_\_\_\_

**Phone Number:** \_\_\_\_\_

**Mailing Address:** \_\_\_\_\_

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## SECTION 2: DOCUMENT REQUEST DETAILS

1. **What type of document(s) do you need?** *(Check all that apply)*

- ☐ Business Agreement
- ☐ Project Contract
- ☐ Legal Template
- ☐ Will

- ☐ Trust
- ☐ Power of Attorney (POA)
- ☐ Estate Planning Document
- ☐ Other: \_\_\_\_\_

**2. Briefly describe the purpose of this document:**

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**3. Who will be involved in this document? (e.g., business partners, employees, family members, etc.)**

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**4. Are there any specific terms or clauses you would like included?**

- ☐ Yes (please specify): \_\_\_\_\_
- ☐ No, I would like guidance on this.

**5. Do you require notarization or additional legal review?**

- ☐ Yes
- ☐ No

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## **SECTION 3: ADDITIONAL CONSIDERATIONS**

**1. Preferred completion deadline:**

- ☐ Urgent (1-3 days)
- ☐ Standard (4-7 days)
- ☐ Flexible (1-2 weeks)

**2. Would you like a consultation before drafting begins?**

- ☐ Yes, I'd like a consultation.
- ☐ No, I am ready to proceed.

3. **Do you have existing documents that need revision?** *(If yes, please attach them.)*

☐ ☐ Yes

☐ ☐ No

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## SECTION 4: AGREEMENT & CONSENT

- I confirm that the information provided is accurate and complete.
- I understand that this service does not constitute legal advice but provides professional document drafting tailored to my needs.
- I agree to the terms and conditions of [Your Business Name].

**Signature:** \_\_\_\_\_

**Date:** \_\_\_\_\_

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This form ensures you capture the necessary details to provide accurate and effective document drafting services. Would you like me to help format it into a **fillable PDF**, **Google Form**, or **web form**?