

LEGAL ASSISTANCE CLIENT INTAKE QUESTIONNAIRE

FOR OFFICIAL USE ONLY – PRIVACY ACT SENSITIVE. Any misuse or unauthorized disclosure may result in both civil and criminal penalties.
PRIVACY ACT STATEMENT: AUTHORITY 5 USC 301, Departmental Regulations; 10 USC 1044. SYSTEM OF RECORDS NOTICE: MJA00002.
ROUTINE USE(S): Information provided is used to provide an administrative record for use by attorneys and clerical personnel directly involved in providing legal assistance, to manage internal counsel assignment, and for internal management of the office, to include generating periodic workload productivity and statistical reports.
MANDATORY/VOLUNTARY DISCLOSURE CONSEQUENCES OF REFUSAL TO DISCLOSE: Disclosure of requested information is voluntary, but failure to provide such information may limit the Legal Assistance Office's ability to provide assistance.

NOTE: Receiving services from a non-attorney at the Legal Assistance Office does not create an attorney-client relationship. In order to form an attorney-client relationship you must meet with an attorney.

**ONLY PROVIDE INFORMATION THAT IS APPLICABLE TO YOUR SITUATION.
 IF IT DOESN'T APPLY INSERT "N/A". ALL QUESTIONS MUST BE ANSWERED.**

Your Name (Last, First, Middle):				DoD ID (EDIPI):	
Contact Numbers	Work:	Home:	Cell:	E-Mail:	
Home Address:		City:		State:	Zip:
Male <input type="checkbox"/>	Female <input type="checkbox"/>	Dt of Birth:		Active Duty <input type="checkbox"/> Reserve/Guard <input type="checkbox"/> Retiree <input type="checkbox"/> Dependant <input type="checkbox"/> (enter Sponsor's info below)	
Please Enter Military Information		Command/Employer:			
Rank/Rate:	Pay Grade:	Branch of Service:		EAOS:	
Your Spouse's or Domestic Partner's Name:			Spouse's Unmarried Name:		

WHAT ISSUE WILL YOU BE DISCUSSING DURING YOUR APPOINTMENT? CHECK ALL THAT APPLY AND CIRCLE APPLICABLE SUBISSUE(S)

- ADOPTION OR NAME CHANGE
- CONSUMER ISSUE: Auto or other purchase or sale, auto/house repair, credit or collection problem, bankruptcy
- DOMESTIC RELATIONS: Support; custody; guardianship; divorce; annulment; paternity
- IMMIGRATION: Naturalization; citizenship; resident permit; visa; employment
- MILITARY RIGHTS & BENEFITS: Servicemembers Civil Relief Act; Uniformed Services Employment and Reemployment Rights Act; Other
- POWER OF ATTORNEY: Includes Health Care Surrogate
- REAL ESTATE OR LANDLORD TENANT: Purchase/Sale; lease; rental; security deposit; eviction
- TAX: Income, sales, intangible, property, ad valorem. If it is to prepare a return during the tax season, go to the Tax Center
- WILLS OR ESTATE PLANNING: Wills, living Wills, trusts, Medicaid, elder law, estate tax, probate
- CRIME VICTIM ASSISTANCE: Need referral to Victims' Legal Counsel
- OTHER ISSUE: (explain) _____

Are you currently represented by an attorney? If yes, the attorney's name:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you seen a Legal Assistance Attorney before? If yes, the attorney's name:	Yes <input type="checkbox"/> No <input type="checkbox"/>
Have you received services from this Legal Assistance office before?	Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what services did you receive?	

CONSENT TO DISCLOSE CONFLICT:

If an opposing party is entitled to Legal Assistance and comes into our office, we cannot represent that person if you have formed an attorney-client relationship here. Do you consent to this office disclosing that we represent you?	Yes <input type="checkbox"/> No <input type="checkbox"/>
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IF THERE IS AN OPPOSING OR ADVERSE PARTY IN YOUR SITUATION PROVIDE COMPLETE DETAILS BELOW

Party's Name:			
Home or Contact Address:		City:	State: Zip:
Contact Phone Numbers	Home:	Work:	Cell:
Active Duty <input type="checkbox"/> Reserve/Guard <input type="checkbox"/> Retiree <input type="checkbox"/> Dependant <input type="checkbox"/> Other (Explain) <input type="checkbox"/>			
Rank/Rate:	Pay Grade:	Branch of Service:	Command:

Your Signature _____ **Date:** _____

FOR OFFICE STAFF ONLY

ID CARD SCREEN: _____	CONFLICT CHECK: _____	CONFLICTED? YES <input type="checkbox"/> NO <input type="checkbox"/>
APPT WITH: _____		
DATE/TIME: _____		

LIMITED SCOPE OF REPRESENTATION

10 U.S.C. sec. 1044 allows military legal assistance offices to provide eligible persons legal assistance concerning their personal civil affairs. This authority is implemented in the Department of the Navy through JAGINST 5800.7G, Manual of the Judge Advocate General and, in the Marine Corps, through MCO 5800.16, Legal Support and Administration Manual.

Consequently, there are some services that this office may not provide. To ensure that you are fully aware of those limitations, please read the following:

1. The legal assistance office may only provide assistance regarding personal civil matters. It does not provide advice or assistance in business matters or for organizational support.
2. The legal assistance office does not produce complex estate planning documents to include: complex wills for persons with assets exceeding the federal estate tax exemption; inter vivos "living" trusts; or special needs trusts.
3. Due to the level of expertise required for certain matters, the legal assistance office provides only basic advice and counseling on bankruptcy and complex tax law.
4. The legal assistance office does not provide real estate services such as title examinations, titling opinions, or real estate closings.
5. The legal assistance office does not file appearances as an attorney of record, or represent clients before courts or administrative/regulatory agency boards, unless representation is authorized in an Expanded Legal Assistance Program (ELAP).
6. With certain exceptions for victims of crimes, the legal assistance office does not provide advice or assistance regarding the following: federal/state/foreign criminal proceedings; courts-martial; non-judicial punishment; administrative separation proceedings.
7. Pursuant to 18 U.S.C. § 205, the legal assistance office is prohibited from providing advice or assistance in any matter in which the United States Government is either a party or has a substantial interest in the outcome, whether or not its interests are adverse to the client.
 - a. The limited exceptions to this include personal tax advice, assistance through administrative/fiscal channels regarding a client's indebtedness to the U.S. Government or military pay matters, and other matters specifically approved by the Staff Judge Advocate to the Commandant of the Marine Corps.
 - b. The following are examples of matters in which the U.S. Government has an interest in which advice or assistance cannot be provided:
 - (1) Prosecution of any tort, military, personnel, TRICARE, or other monetary claim against the U.S. Government or any defense of such claim.
 - (2) Regarding an official criminal investigation or administrative investigation of the Department of Defense or any agency therein in which the individual seeking assistance is a party, witness, or subject of such investigation, with certain exceptions for victims of crimes who are otherwise eligible for legal assistance.
 - (3) Administrative complaints under Article 138 of the Uniform Code of Military Justice, or Section 1105 of the Navy Regulations, petition for relief to the Board for Correction of Naval Records or Naval Discharge Review Board, or rebuttal of a fitness report or evaluation.
 - (4) Civil Rights, Constitutional, or Employment complaints against the U.S. Government. This does not prohibit general advice to Reservists concerning the Uniformed Services Employment and Reemployment Rights Act (USERRA).
8. If two or more eligible persons with conflicting interests seek advice from this office, the party first establishing an attorney-client relationship will be provided representation.

Signature and date