



2608 Stonewall Street | P.O. Box 1353 | Greenville, Texas 75403 | P: 903.454.0044 | F: 903.454.1514

POTENTIAL NEW CLIENT WORKSHEET

Real Property – Services starting at \$300 (inclusive off filing fees)

Dear Potential New Client,

Thank you for seeking our legal services for your real property needs. We understand you may need your documents quickly, or you may need to consult with an attorney before knowing what is best for you. To make this process as seamless as possible, it is requested you fill out the worksheet below, and submit it to our firm via email to Roxana@ScottRayLaw.com.

If the requested information is unknown state "Unknown." If information does not apply "N/A." Should you have any questions regarding how to complete this form or submit it to our firm, please feel free to contact Roxana La Rosa, at (903) 269-3614.

We look forward to reviewing your request and will work to respond to you promptly if our firm can serve your needs.

Sincerely,

The Legal Team of Scott, Ray & Sullivan, PLLC

1. Potential Client(s) Information

Name	First, Middle, Last	
Address	Street Name & No.	
Address	City, State, Zip	
Phone	Preferred Number and Type	
Last 4 of Social Security and Driver's License		
Email		

2. Description of Services Sought

Do you own the property subject to your inquiry?	Yes <input type="checkbox"/> No <input type="checkbox"/> Owner: _____
What is the Address of the subject property, including county or counties?	_____
Is this transaction an owner-finance agreement?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you seeking to clear a title cloud?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you seeking to foreclose on a property sold to someone under an owner-finance note?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Does this matter involve landlord-tenant issues?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you the buyer, seller, or other?	Buyer <input type="checkbox"/> Seller <input type="checkbox"/> Other: _____

Are you interested in learning about strategic estate planning to protect real estate not protected by homestead?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Are you interested in learning about business entity formation and/or partnership agreements with respect to a Real Estate Investment Company?	

Please provide a brief description of the services you are seeking, or your goal with respect to your real property legal needed. If you know the address of real property involved in your matter, please provide as much information about the property as possible.

3. Contact Information for Free Consultation

Consultation Preference	Phone		In Person	
Preferred Days of Week for Consultation				
Preferred Times of Day for Consultation				
How did you hear about our firm?				

4. Strategic Estate Planning

Do you want to discuss ways to avoid probate, protect your assets, or other estate planning strategies?

Yes		No	
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Please use space below to provide additional information or questions.

Please submit your completed worksheet to our firm via one of the following:

Email: Roxana@scottraylaw.com

Fax: (903) 454-1514

Mail: PO Box 1353, Greenville, Texas 75403-1353

Need help or have questions about this form?

Contact Roxana La Rosa at: Roxana@Scottraylaw.com or (903) 269-3614.