

LEGAL ASSISTANCE CLIENT INTAKE QUESTIONNAIRE



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; and 32 CFR Part 727, Legal Assistance.
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.
 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. The attorney-client relationship will terminate when the attorney's involvement in the current case ends.

First Name		Middle Name		Last Name		Maiden Name (if applicable)	
Street Address:				City:		State:	
DOD ID #:		Cell Phone:		Birth Date:		Email:	
Male	<input type="checkbox"/> Active Duty	Dependent		Name of Spouse (include maiden name in parentheses)			
Female	<input type="checkbox"/> Reserve/Guard	Other (Explain):					
	<input type="checkbox"/> Retiree						
<u>Military Information for Self or Spouse/Sponsor</u>							
Marine Corps	<input type="checkbox"/> Air Force	Coast Guard		Rank/Rate:		Unit	
Navy	<input type="checkbox"/> Army	DoD Civilian					
Are you currently represented by a civilian attorney or have you seen a Military Legal Assistance Attorney before?							Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, what is the attorney's name?							
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?							

ADVERSE OR OPPOSING PARTY INFORMATION ***THIS MUST BE FILLED OUT***

First Name	Middle Name	Last Name	Maiden Name (if applicable)
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-OR-

Name of Business:			
Street Address:		City:	State:
			Zip:

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. It will then be necessary to tell the opposing party or any conflicted party that this office represents you and cannot represent them. Do you consent to this office disclosing that we represent you?	Yes <input type="checkbox"/> No <input type="checkbox"/>
Signature: _____ Date: _____	

FOR OFFICE STAFF ONLY

ID CARD SCREENED <input type="checkbox"/>	CONFLICT CHECKED <input type="checkbox"/>	CLERK NAME: _____ SIGNATURE: _____
ASSIGNED ATTORNEY NAME AND RANK:	ATTORNEY REVIEWED CMS CASE FILE: <input type="checkbox"/> CMS REVIEWED	ATTORNEY SIGNED:

What issue will you be discussing in your appointment? Check all that apply and circle applicable issues.

- ☐ **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) _____

Please provide a summary of your legal situation:

[illegible]



UNITED STATES MARINE CORPS
LEGAL ASSISTANCE OFFICE
LEGAL SERVICES SUPPORT SECTION PACIFIC
MARINE CORPS INSTALLATIONS PACIFIC
UNIT 35001
FPO AP 96373-5001

LAO
5000-82
Date: _____

CLIENT
5000-82
Date: _____

MEMORANDUM OF AGREEMENT
BETWEEN
LEGAL ASSISTANCE OFFICE, LEGAL SERVICES SUPPORT TEAM - OKINAWA
AND
FULL NAME OF CLIENT: _____

Subj: LIMITED SCOPE OF REPRESENTATION AND MEMORANDUM OF AGREEMENT

1. Purpose. 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 5800.7F, Manual of the Judge Advocate General and, in the Marine Corps, through MCO 5800.16, Legal Support and Administration Manual.
2. Scope. 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:
3. 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.
4. 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.
5. 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.
6. The legal assistance office does not provide real estate services such as title examinations, titling opinions, or real estate closings.
7. 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).
8. 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.
9. 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).

10. Conflicts of Interest. 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.

11. Effective Date and Duration of Services. This agreement is effective on the date listed above and will continue until the first of any of the following events, at which time my case will be closed and this limited representation terminated:

a. My case has reached a level of complexity that is outside the scope of services the LAO is allowed to provide or I have hired a civilian attorney to represent me.

b. My request is for a single day, advice and counseling session only.

c. I have requested closure or the LAO has already exhausted all means of assisting me that are within the office's scope and capabilities of legal representation per the references.

d. The LAO has no active requests from me, I have no scheduled appointments, or I have not contacted the LAO office within the previous thirty days.

12. Permission to Contact. I authorize the LAO to contact any person, entity, or organization on my behalf in connection this limited scope of representation, to include _____
_____(Name of Person(s) or Organization(s)).

Legal Assistance Attorney Signature

Client Signature

Print:

Print: