

**SHADE & SHADE LLC**  
**ATTORNEYS AT LAW**

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**NEW CLIENT INFORMATION (INDIVIDUALS)**

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

Full Name: \_\_\_\_\_ Name preference: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: \_\_\_\_\_ SSN: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Home Phone: \_\_\_\_\_

E-mail Address: \_\_\_\_\_

Address: \_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_

Preferred Contact Method: \_\_\_\_\_

Marital Status: \_\_\_\_\_ Single \_\_\_\_\_ Married \_\_\_\_\_ Divorced \_\_\_\_\_ Widowed

(If Applicable)

Full Name: \_\_\_\_\_ Name preference: \_\_\_\_\_

Birth Date: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: \_\_\_\_\_ SSN: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ E-mail Address: \_\_\_\_\_

Employer: \_\_\_\_\_

Employer's Address: \_\_\_\_\_

Have you been represented by our office before? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, by which attorney? \_\_\_\_\_ David C. Shade \_\_\_\_\_ Michael R. Shade \_\_\_\_\_ Matthew F. Kear

If yes, approximately when and for what reason? \_\_\_\_\_

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Do you wish to be represented by a specific attorney? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, by which attorney? \_\_\_\_\_ David C. Shade \_\_\_\_\_ Michael R. Shade \_\_\_\_\_ Matthew F. Kear

Were you referred to our office? \_\_\_\_\_ Yes \_\_\_\_\_ No

If yes, by whom? \_\_\_\_\_

Please summarize the legal services you are requesting: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Shade and Shade Privacy Policy

## Important - Please Read Carefully

Our law firm collects personal information only when you submit it to us. If you decide to submit such personal information, we or an external service provider will retain the information that you submit in a database, and we will use this information to complete your request. We may also use the information retained in the database to communicate with you directly via email or direct mail, such as to inform you about matters we believe to be of interest to you.

In order to guard your nonpublic personal information, we maintain reasonable physical, electronic and procedural safeguards, but we cannot guarantee that your personal information will never be disclosed in a manner inconsistent with this policy. Further, we assume no responsibility for how any third party protects your personal information.

With the passage of the Gramm-Leach-Bliley Act, attorneys, as well as CPAs, banks, trust companies and other financial service providers, are now required to inform their clients of their policies regarding the privacy of client information.

Attorneys have always been required under their Rules of Professional Conduct to keep their clients' information confidential. Therefore we have always protected your right to privacy. Furthermore, in order to practice before the Internal Revenue Service (which we only do on a very limited basis generally related to federal estate and gift tax issues), we are forbidden from disclosing any client information provided for tax planning or preparation services we provide to you without your prior written consent.

**Non-Public Information We Collect.** We collect non-public personal information about you that is provided by you or obtained by us with your authorization.

**Parties to Whom We Disclose Information.** We do not disclose private personal information about clients or former clients obtained in the course of our practice, except as required or permitted by law.

- **Required Disclosures**

- As legal professionals, we are required by law to make disclosures of private information in a few limited instances including, by way of examples, where we have knowledge of elder or child abuse, or of the intent to commit a crime.

**Shade and Shade Privacy Policy is Continued on Other Side**

- **Permitted Disclosures**

- **Employees.** In order to complete work you engaged our law firm to produce, your private information may need to be disclosed to employees of our law firm who are bound by the same rules as the attorney or law firm which employs them.
- **Outside Providers.** On occasion, we may, on a need to know basis, provide some of your private information to unrelated third parties who may be called on to assist us in completing work you have engaged our law firm to complete. Such third parties may be hired by you or, in some instances, hired by our law firm. Examples of third parties to whom your private information might be disclosed are an accountant to assist us with tax research or accounting services, an appraiser to help us to value your assets, a life insurance professional providing us with quotes for obtaining life insurance coverage, a surveyor, or an independent title examiner.

**Protecting the Confidentiality and Security of Client Information.** In order to better serve you, as well as comply with certain professional guidelines and requirements, we retain records of the professional services that we provide. As part of our commitment to provide you with the best service possible, we maintain reasonable physical, electronic and procedural safeguards to protect the private information of our clients and former clients. These safeguards comply with our professional standards as well as with applicable regulations.

**Request Not to Release Information.** The Federal Trade Commission regulations require us to notify you of your right to request that our law firm not release your non-public personal information. While it is unnecessary for you to do so, because our law firm does not release any private information, in the interest of satisfying the regulations we include this disclosure.

**Request Not to Release Information.** Although the attorney/client privilege by which our law firm is bound prohibits us from releasing any communications between you and one of our attorneys, you can always request that our law firm release such information to anyone you designate.

**Internet E-mail.** Information sent to our law firm by way of internet email is not secure and is done so on a non-confidential basis. Any information you send our law firm via email is done at your own risk.

**Sending Information Does Not Form an Attorney - Client Relationship. The act of transmitting or sending information by any means does not create an attorney-client relationship between you and our law firm, nor is it intended to do so. The transmission of information or an inquiry about or request to perform legal services via e-mail on telephone does not constitute or create an attorney-client relationship with our law firm.**

Should you have any further questions regarding our privacy policies and procedures, please feel free to call our office by telephone at (740) 363-9232, or by mail address to Shade and Shade, 236 West Central Avenue, Delaware, Ohio 43015.