|  |  |  |
| --- | --- | --- |
| Client Information | | |
| Client:  Pronoun: | Maiden/Prior Name: | |
| Address: | DOB: | SS#: |
| Cell Phone: | Home/Work Phone: |
| Employer: | Email Address: | |
| Emergency Contacts [Name, Address, Phone, Email]: | | |

|  |  |  |
| --- | --- | --- |
| Spouse Information | | |
| Spouse:  Pronoun: | Maiden/Prior Name: | |
| Address: | DOB: | SS#: |
| Cell Phone: | Home/Work Phone: |
| Employer: | Email Address: | |

|  |  |  |
| --- | --- | --- |
| Names of Children | SS# | Date of Birth |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |

|  |  |
| --- | --- |
| Intake Checklist and Overview of Key Docket Dates for Calendar  [see also the PLF Practice Aid – Dissolution Checklist] | |
| Petition Filed: | Service completed: |
| Appearance Due: | |
| ORS 107.089 documents due: | ORS 107.089 documents exchanged: |
| Discovery due to other party: | Discovery due from other party: |
| Pretrial updated discovery from client: | Pretrial updated discovery from other party: |
| Deposition of [Party/Witness]: | Deposition of [Party/Witness]: |
| Deposition of [Party/Witness]: | Deposition of [Party/Witness]: |
| Temporary Orders, Limited Judgment: | |
| Uniform Support Declaration due: | Uniform Support Declaration filed: |
| Assets/Liabilities spreadsheet due: | Assets/Liabilities spreadsheet filed: |
| Notice of *Lis Pendens:* | Show Cause hearing(s): |
| FAPA Order: | Deadline to request hearing: |
| Restraining Order: | Restraining Order expires: |
| Response received: | |
| Notice of Intent to Take Default: | Default taken: |
| Offer of settlement sent: | Response to settlement offer due: |
| Settlement conference: | Mediation:  Co-Parent Education class: |
| TRIAL DATE: | Trial prep appointment with client: |
| Judgment entered: | *Lis Pendens* discharged: |
| Motion for remote appearance: |  |
| Appeal deadline: | Notice of Termination of Services: |

Yes No

Does client’s Last Will and Testament need to be changed? 🞎 🞎

Do life insurance or retirement plan beneficiaries need to be changed? 🞎 🞎

Does judgment need to be recorded in another county? 🞎 🞎

Do any other title transfers (car titles, bargain and sale deeds) need to be made? 🞎 🞎

Does certified copy of judgment need to be sent to insurance company (ORS 107.820(6))? 🞎 🞎

Do pension, profit-sharing, or stock bonus plans qualify under 26 USC § 401(a)(13) and 414(p)? 🞎 🞎

Does Qualified Domestic Relations Order or Orders (QDRO)(s) need to be prepared? 🞎 🞎

Does client need referral to support collection services/wage withholding order? 🞎 🞎

Refer client to tax professional regarding tax issues? 🞎 🞎

Do joint financial accounts (bank accounts, debts) need to be disentangled/closed? 🞎 🞎

Personal property needs to be exchanged? 🞎 🞎

**IMPORTANT NOTICES**

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