

# Client Interview Form

## Personal Information

Last Name: Perez-Anders First: Isabel Middle: Inez  
Aliases: Isabel Perez  
Date of Birth: 7 / 9 / 1995 Place of Birth: Zihuatenejo, MX  
U.S Citizen:  Yes  No If No, Country of Citizenship: \_\_\_\_\_  
Address: 277 1/2 N. Jackson Street (Whitaker area)  
Phone Number: (541) 555-4220 Work Number: \_\_\_\_\_  
Cell Number: \_\_\_\_\_ Email Address: \_\_\_\_\_  
Where may we contact you? \_\_\_\_\_  
Employer Name: Self-employed/recent grad Position Title: Brewer?  
Annual Income: <15,000 How did you hear about us? friend

## Legal Matter

**Nature of Legal Matter:** Isabel is a homebrewer of beer. She is the Vice President of a local Minority/Women's Business group. She has three major questions: (1) She wants to open a microbrewery or become a licensed brewer in some capacity so she can sell her beer. She needs to know everything about issues involved with opening a brewery, from licensing and land use to other business concerns. She wants to do the brewing in her garage because that would reduce overhead. (2) She has taken her beers to some craft brew festivals and after the last one, she got a letter from another brewer who has made some threats regarding her beer name and logo so she needs to know about federal and state law on that issue. (3) She wants to know how to track and research legislation, federal and state, that impacts brewers (maybe marijuana or CBD beer?). Isabel is a friend of one of my friends and I have agreed to take her case pro bono. We will need to keep track of hours for reporting to the Bar Association.

**Urgency:**  1 (Just investigating my rights)  2  3  4  5 (Critically important)

**Desired Outcome:** Open microbrewery or brewing business to make and sell beer. Suggestions on how to respond to threatening letter from other brewer. Beginning of a business plan.

**Relevant Documents:** Letter from brewer. Image of beer logo and name.

## Other Involved Parties

Name: none Relation: \_\_\_\_\_

## Previous Legal Consultation on This Matter

Attorney: Andy Smith Law Firm: Andrew Smith LLC Date: \_\_\_\_\_  
Why didn't you hire this attorney? Too expensive.

## Prior Legal Counsel on Other Matters

Attorney: None Law Firm: \_\_\_\_\_ Dates: \_\_\_\_\_  
Circumstances: \_\_\_\_\_