

INTERVIEWING ATTY _____

CONFLICT CP: _____ INI: _____

DATE: _____

CONFLICT BXL: _____ INI: _____

BAILEY & GALYEN

Attorneys at Law

SOCIAL SECURITY INTAKE SHEET

Name _____ DOB: _____ Sex: M ___ F ___
Last Name First Middle Maiden

Place of birth _____
City County State Country

Social Security Number: _____ Drivers License Number: _____ State _____

Address: _____ Apt. # _____

City: _____ County: _____ State: _____ Zip: _____

Home Phone: (_____) _____ Work Phone: (_____) _____

E-Mail Address: _____ Cell Phone: (_____) _____

I authorize emails concerning my case. I authorize emails of general interest from Bailey & Galyen.
 I authorize a follow up call regarding my consultation. If yes, please list a contact number. (_____) _____

Marital Status: _____ Spouse's Name: _____

What date did you apply for disability benefits? _____ What date did you become disabled? _____

What date did you last work? _____ What was your job? _____

What dates were you denied benefits? (Enter all dates if multiple applications or multiple denials on same application)

Do you know what level of appeal your case is on? _____

Did you apply for both DIB and SSI or only one? _____

Highest grade completed in school? _____ any vocational training? _____

What type of work have you done for the last 15 years? _____

Did you receive any worker's compensation benefits associated with your disability? _____

How much per month and what dates? _____

What are your impairments or your diagnosis? _____

Which doctors have treated you and are treating you for your disability?

Have you or family member been involved in any type of accident in the last two years? Yes _____ No _____

Have you or a family member ever suffered any serious injuries after taking a prescription or non-prescription drug? Yes _____ No _____

Do you have need of legal assistance for any immigration matter? Yes _____ No _____

Purpose of visit today: _____ Do you currently have a will? Yes _____ No _____

HOW WERE YOU REFERRED TO US? (Circle one) Office Sign I'm a Previous Client Bar Association B&G Letter TV Ad Radio

Billboard Website In Mesquite Phonebook: name of book _____ Friend: Name of Friend _____

An Attorney: Name of attorney _____ Other: _____

Bailey & Galyen Employee: Name of Employee _____



Bailey & Galyen

ATTORNEYS AT LAW

PRIVACY POLICY REGARDING SOCIAL SECURITY NUMBERS

Social Security information will only be used in the event you hire the firm to represent you in your legal matter, and then only when necessary in limited use during the course of your case.

- **Social Security numbers are collected by the law firm from the client and all clients provide such information to the firm in writing.**
- **Social Security numbers are most often used to positively identify parties. Some uses may include initial service, in court orders, in orders to withhold wages for child support, in required reports filed with the State of Texas, or to obtain retirement information used to divide retirement benefits. Most courts require Social Security numbers of all parties.**
- **All information received from a client is confidential. Numbers are not released from the firm unless authorized by the client or required in the course of representation as previously stated herein.**
- **The employees of Bailey & Galyen have access to this personal information.**
- **Every step is taken to protect your privacy. This information is kept secure within the offices of the firm in file folders and file drawers until such time that the file information is retired and the file removed to storage in a locked, off-site storage facility. Files will eventually be shredded after the time designated by the State Bar requirement for maintaining the records has expired. Social Security numbers are also kept in firm software programs that are protected by password in our system which is further protected by extensive firewalls.**

I acknowledge that I have read the above privacy information provided by Bailey & Galyen regarding use of my Social Security number.

Signature

Date