

Kelly M. Davis & Associates, LLC

Attorneys and Counselors at Law

Mechanic's Lien General Information Sheet

Date:

Client Name:

Referred By:

Business Name (if applicable):

Position in business (if applicable):

Street Address:

Home Phone:

Work Phone:

City:

State:

Zip Code:

Cell Phone:

Fax Number:

E-mail Address:

Drivers License Number:

State:

Social Security Number:

Birth Date:

Address of property where work was performed:

Legal description of property:

Total money owed (breakout if any is retainage):

Month work was performed for money actually owed:

PERSON OR COMPANIES INVOLVED IN YOUR LEGAL ISSUE: * Please provide correct, legal names:**

Contractor (Who hired you):

Contact:

Address and Phone Numbers:

General Contractor of Entire Project (If different than above):

Contact:

Address and Phone Numbers:

Is this a tenant/landlord type project?

Name and Address of owner:

Name and Address of Tenant of property:

Contract Type

Contracting Party

Total amount of contract:

Have you signed ANY releases on this Job

*****Please attach a copy of your CONTRACT and any RELEASES to this form*****

Is there a retainage agreement between you and the owner or GC?

If yes, what is the retainage percentage:

Description of actual work or material provided that is unpaid:

Is the property owned by a state or the federal government?

If yes, what is the name and address of the bonding company?

*****Please attach a copy of the bond to this form*****

Any additional details?

Accuracy of Information Provided

_____ (initial) KMDA is not responsible if the information provided above is not accurate or thorough. We will try and verify the information provided by Client with cursory searches of the county websites, but we do not guaranty that KMDA will catch any errors or omissions provided by Client.

_____ (initial) If Client is not able to fill-in all the requested information on the Client Information Sheet or the information provided does not match our cursory search, KMDA will endeavor best efforts to locate the missing or incorrect information through additional research at our normal hourly rate. Because we do not have the resources of a title plant, KMDA cannot guarantee that the information provided is accurate or up to date.

PRIVACY POLICY AS TO SOCIAL SECURITY NUMBERS

SOCIAL SECURITY INFORMATION WILL ONLY BE USED IN THE EVENT YOU HIRE THE FIRM TO REPRESENT YOU FOR ANY MATTER AND THEN ONLY 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 LAW FIRM IN WRITING.
- SOCIAL SECURITY NUMBERS ARE USED TO IDENTIFY PARTIES WHETHER FOR INITIAL SERVICE IN COURT ORDERS, IN ORDERS TO WITHHOLD WAGES FOR CHILD SUPPORT, IN REQUIRED REPORTS FILED WITH THE STATE OF TEXAS, OR TO USE IN COLLECTION OF ATTORNEY FEES IF CLIENT IS DELINQUENT AND WE NEED TO INVOLVE OUR COLLECTION AGENCY.
- ALL INFORMATION RECEIVED FROM A CLIENT IS CONFIDENTIAL, PARTICULARLY SOCIAL SECURITY NUMBERS. SOCIAL SECURITY 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 KELLY M. DAVIS AND ASSOCIATES, LLC HAVE ACCESS TO THIS PERSONAL INFORMATION.
- EVERY STEP IS TAKEN TO PROTECT YOUR PRIVACY. THIS INFORMATION IS KEPT SECURE WITHIN THE OFFICE OF THE FIRM IN CLIENT BINDERS AND FILE DRAWERS, UNTIL SUCH TIME THAT THE FILE INFORMATION IS RETIRED AND THE FILE REMOVED TO STORAGE IN A LOCKED AREA. THE CLIENT INFORMATION WILL EVENTUALLY BE SHREDDED BY A CERTIFIED VENDOR THAT WE EMPLOY AT THAT PARTICULAR TIME.

I acknowledge that I have read the foregoing, that I have provided the above information.

Signature

Date