CJA BILLING SERVICES

CJA Billing & Paralegal Services | Alely Sepulveda-Coleman

Phone: (619) 862-1160 Email: cjabillingservices@gmail.com

NEW CLIENT INTAKE FORM

2026

1. BUSINESS INFORMATION

Business Name:

Business Address:

City, State, Zip:

Office / Home Phone:

Primary Cell:

Primary Email:

2. PREFERRED METHOD OF COMMUNICATION

☐ Phone ☐ Email ☐ Text Message

3. REQUESTED SERVICES (check all that apply)

☐ Attorney billing services

☐ Interpreter billing services

☐ Investigator billing services

☐ Paralegal support

☐ Additional administrative support

4. PROJECT INFORMATION

Description of requested assistance:

Preferred Start Date:

Preferred Consultation Time:

Special Instructions:

ACCOUNT SECURITY NOTICE

For your protection, never share Login.gov passwords, authentication codes, recovery codes, or any other security credentials on this form, by email, or through any website. You remain in control of your own accounts at all times. Any legitimate authorization arrangement is discussed and set up through official, secure procedures during onboarding.

W-9 INFORMATION

If your billing address or billing information needs to be updated, an updated IRS Form W-9 may be needed. Do not attach tax documents to this form - we will coordinate any required documents with you privately through a secure channel during onboarding.

HOW TO RETURN THIS FORM

1. Complete the fillable fields on page 1 and save the file (File > Save, or your PDF app's save / share option).
2. Email the saved form to cjabillingservices@gmail.com, or call (619) 862-1160 to arrange another secure delivery method approved by Alely.
3. We will contact you using your preferred communication method to schedule your initial consultation.

Works on desktop and mobile: open in any PDF app (Adobe Acrobat Reader is free) to fill, save, and send.