M.S. DEAL & ASSOCIATES LLC

Immigration Consulting | Legal Support | Document Preparation | Justice of the Peace

www.askmelissadorsett.com | Nassau, The Bahamas

CLIENT ONBOARDING INTAKE FORM

Complete this form before substantive file review. Answer every applicable question. If a question does not apply, write N/A.

PERSONAL DETAILS

Full Legal Name	
Previous / Other Names	
Date of Birth	
Place of Birth	
Nationality / Citizenship	
Marital Status	
Passport No. / Expiry	
NIB No. (if applicable)	

CONTACT AND RESIDENCE

Residential Address	
Directions to Residence	
Island / City / Settlement	
P.O. Box (optional)	
Primary Telephone	
Alternate Telephone	
Email Address	
Preferred Communication	

SERVICE REQUEST

- ☐ Immigration
- ☐ Visa Assistance
- ☐ Divorce / Matrimonial Document Preparation
- ☐ Justice of the Peace
- ☐ Loan Application Packaging
- ☐ Business Licence / Corporate Services
- ☐ Probate / Estate Support
- ☐ Marriage / Wedding Support
- ☐ Affidavit / Document Preparation
- ☐ Other

Briefly explain what you need assistance with and the outcome you are seeking:

_____
_____
_____
_____

Important deadline / travel date / hearing date	
How did you hear about us?	
Existing client referral name (if any)	

PRIOR MATTERS AND CURRENT STATUS

List any previous applications, refusals, court matters, filings, or professional assistance relating to this matter:

_____
_____
_____
_____

DOCUMENTS SUBMITTED WITH INTAKE

- ☐ Passport
- ☐ NIB Card
- ☐ Driver's Licence / ID
- ☐ Birth Certificate
- ☐ Marriage Certificate
- ☐ Supporting Document 1
- ☐ Supporting Document 2
- ☐ Supporting Document 3
- ☐ Supporting Document 4
- ☐ Supporting Document 5

DECLARATION

I confirm that the information and documents I provide are true and accurate to the best of my knowledge. I understand that additional documents or clarification may be required after review.

_____ _____

Client Signature **Date**