

Attorney Case Intake Questionnaire

Attorney Toolbox™

Prepared by Sepi Miller, CDRE®

Pennsylvania Divorce Real Estate Expert

412-498-7670 | sepi@sepimiller.com | www.padivorcerealestateexpert.com

DRAFT PROFESSIONAL RESOURCE - REVIEW BY PENNSYLVANIA COUNSEL BEFORE PUBLICATION OR USE

Purpose and Use

Collects legal-process, property, communication, and deadline information needed to define a Pennsylvania divorce real estate assignment. Do not include Social Security numbers or complete financial account numbers.

Version 1.0 | Last updated August 2026

Case Administration

LAW FIRM**RESPONSIBLE ATTORNEY****CLIENT****OPPOSING PARTY****PENNSYLVANIA COUNTY / COURT****DOCKET NUMBER****JUDGE****CASE STATUS****PROPERTY ADDRESS**

Current Legal / Property Posture

- | | |
|---|--|
| ☐ Pre-complaint / consultation | ☐ Pending divorce action |
| ☐ Equitable distribution pending | ☐ Settlement negotiations |
| ☐ Mediation | ☐ Court-ordered sale |
| ☐ Exclusive possession order | ☐ PFA / safety restrictions |
| ☐ Property listed | ☐ Offer pending |
| ☐ Foreclosure / tax delinquency | ☐ Bankruptcy issue |

RELEVANT COURT ORDERS, STIPULATIONS, OR RESTRICTIONS

Real Estate Issues

- | | |
|---|--|
| ☐ Disputed listing price | ☐ Sale versus retain decision |
| ☐ Equity buyout | ☐ Mortgage qualification |
| ☐ Refinance / assumption | ☐ Deferred maintenance |
| ☐ Post-separation improvements | ☐ HELOC / debt tracing |
| ☐ Access / showing conflict | ☐ Personal property dispute |
| ☐ Relocation analysis | ☐ Expert report / testimony |

ISSUES REQUIRING ANALYSIS

REQUESTED PROFESSIONAL OPINION OR DELIVERABLE

Communication and Safety

- | | |
|---|--|
| ☐ Attorney-only communication | ☐ Copy both counsel |
| ☐ Direct logistics with client | ☐ Separate party communications allowed |
| ☐ No direct party contact | ☐ Safety plan required |

SAFETY, ACCESS, OCCUPANCY, PET, ALARM, OR PFA INSTRUCTIONS

Deadlines and Source Materials

REPORT DUE**MEDIATION****DEPOSITION****HEARING / TRIAL****OTHER DEADLINES**

- | | |
|--|--|
| ☐ Pleadings | ☐ Court orders |
| ☐ Settlement proposal | ☐ Deed / title |
| ☐ Mortgage / HELOC statements | ☐ Appraisal / CMA |
| ☐ Inspection reports | ☐ Repair invoices / permits |
| ☐ Property photographs | ☐ Listing history |
| ☐ Communications | ☐ Other |

ATTORNEY NOTES / CONFIDENTIAL INSTRUCTIONS