



Syndicate Subscription Legal Plans

EVICTON DEFENSE CLIENT INTAKE QUESTIONNAIRE:

SERVED WITH A SUMMONS & COMPLAINT? Contact us TODAY. The deadline to respond to an eviction lawsuit is very short (example, in California, generally 10 court days) and missing it can result in a default judgment and lockout. A landlord may NOT change your locks, remove your belongings, or shut off utilities without a court order.

CONFIDENTIAL. This questionnaire is for residential tenants and commercial (business) tenants facing eviction, an eviction notice, or landlord actions to force them out. Please do not move out, stop paying rent, or sign anything from your landlord until we have reviewed your situation. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

Client type:

☐ Residential tenant

☐ Commercial / business tenant

☐ Full Legal Name: _____

Business name (if commercial): _____ Entity type: _____

Phone: _____ Email: _____

Mailing address (if different from rental): _____

Syndicate Plan Member ID: _____ Primary language: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — WHERE ARE YOU IN THE PROCESS?

1.1 Check the most recent that applies:

☐ Received a notice (no lawsuit yet)

☐ Served with Summons & Complaint (eviction lawsuit)

☐ Filed a response in court

☐ Trial date set

☐ Judgment entered against me

☐ Received a sheriff / marshal notice to vacate

☐ Landlord threatening or harassing me

☐ Locked out / utilities shut off / belongings removed

1.2 Key date (response deadline, hearing, trial, or lockout date): _____

PART 2 — THE PROPERTY & LANDLORD

2.1 Rental address: _____ Unit: _____

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



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2.2 Property type:

- ☐ Apartment ☐ House ☐ Condo / townhouse
☐ Room rental ☐ Mobile home / space ☐ ADU / guest house
☐ Retail / office space ☐ Industrial / warehouse ☐ Other

2.3 Landlord / owner name: _____ Phone: _____

Property manager / company: _____ Phone: _____

Landlord address for notices / rent: _____

2.4 Approx. year building was built: _____ Number of units: _____

2.5 Does the landlord or their family live on the property? ☐ Yes ☐ No

2.6 Is the unit in a rent-controlled or just-cause city? ☐ Yes ☐ No

2.7 Housing assistance:

- ☐ Section 8 / Housing Choice Voucher ☐ Public housing
☐ Affordable / tax credit housing ☐ Other subsidy
☐ None

2.8 Has the property been sold or gone into foreclosure recently? ☐ Yes ☐ No

PART 3 — YOUR TENANCY

3.1 Move-in date: _____ Current monthly rent: \$ _____

3.2 Rental agreement:

- ☐ Written lease ☐ Month-to-month ☐ Oral agreement ☐ Lease expired

Lease end date: _____ Security deposit paid: \$ _____

3.3 Recent rent increases (dates and amounts): _____

3.4 *Everyone Living in the Unit (residential):*

Name	Age	Relationship	On Lease?

3.5 Does anyone in the household have a disability, or is anyone 62 or older? ☐ Yes ☐ No



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PART 4 — THE NOTICE

4.1 Type of notice received:

- ☐ Pay rent or quit (e.g., 3-day)
☐ Quit — nuisance / illegal activity
☐ Owner move-in
☐ Withdrawal from rental market
☐ Commercial default notice

- ☐ Perform covenant (fix a lease violation) or quit
☐ Termination (30 / 60 / 90-day)
☐ Substantial remodel / demolition
☐ Foreclosure / new owner
☐ Other

4.2 Date on notice: _____ Date you received it: _____

4.3 How was it delivered?

- ☐ Handed to me
☐ Left with another adult
☐ Posted on door and mailed
☐ Mailed only
☐ Email / text only

4.4 Amount demanded: \$ _____

Does the amount include late fees, utilities, or other charges besides rent? ☐ Yes ☐ No

4.5 Reason stated for eviction: _____

4.6 Did the notice offer relocation assistance or mention just-cause reasons? ☐ Yes ☐ No

PART 5 — THE COURT CASE

5.1 Court / County: _____ Case Number: _____

5.2 Date served: _____ How served: _____

5.3 Documents received:

- ☐ Summons
☐ Complaint
☐ Prejudgment claim of right to possession
☐ Other

5.4 Have you filed a response (answer, motion, demurrer)? ☐ Yes ☐ No

If yes — what and when: _____

5.5 Trial / hearing date: _____ Landlord's lawyer: _____

5.6 Has there been any mediation or settlement discussion? ☐ Yes ☐ No

If yes, explain: _____

PART 6 — RENT & PAYMENTS

6.1 Rent the landlord claims is owed: \$ _____ What you believe is owed: \$ _____

6.2 Did the landlord accept any rent after serving the notice? ☐ Yes ☐ No

6.3 Did the landlord refuse rent you offered? ☐ Yes ☐ No

6.4 Did you withhold rent because of repair problems? ☐ Yes ☐ No

6.5 Have you applied for rental assistance? ☐ Yes ☐ No



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6.6 Amount you could pay now: \$ _____ Per month going forward: \$ _____

PART 7 — POSSIBLE DEFENSES

7.1 Check anything you believe may apply:

- | | |
|---|--|
| ☐ Defective / improperly served notice | ☐ Rent refused or partial rent accepted |
| ☐ Retaliation | ☐ Discrimination / civil rights |
| ☐ Disability accommodation denied | ☐ Uninhabitable conditions |
| ☐ Rent control / just-cause violation | ☐ Relocation assistance not paid |
| ☐ Landlord harassment | ☐ Illegal lockout / utility shutoff |
| ☐ False nuisance claim | ☐ Injury / dangerous condition |
| ☐ Housing program rules violated | ☐ Not sure — please evaluate |

7.2 Explain: _____

PART 8 — CONDITIONS & REPAIRS

8.1 Problems in the unit:

- | | | |
|--|--|---|
| ☐ Mold / moisture | ☐ Pests / rodents | ☐ Roof or plumbing leaks |
| ☐ No heat / hot water | ☐ Electrical problems | ☐ Broken doors / locks |
| ☐ Sewage / plumbing | ☐ Lead paint / asbestos | ☐ Other |

8.2 Did you notify the landlord in writing? ☐ Yes ☐ No

Date(s): _____

8.3 Did a city or county code inspector visit or issue a citation? ☐ Yes ☐ No

8.4 Have you or anyone in the household been injured or made ill? ☐ Yes ☐ No

If yes, explain: _____

8.5 Do you have photos, videos, or repair requests? ☐ Yes ☐ No

PART 9 — COMMERCIAL TENANTS

9.1 Lease term and expiration: _____ Base rent: \$ _____

CAM / NNN charges: \$ _____ Personal guarantor: _____

9.2 Business use / years at location: _____

9.3 Is there a dispute over CAM charges, repairs, or permitted use? ☐ Yes ☐ No

If yes, explain: _____



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9.4 Do you have renewal options or other lease rights? ☐ Yes ☐ No

9.5 Estimated cost to relocate the business: \$ _____

PART 10 — YOUR GOALS

10.1 What outcome do you want?

- | | |
|--|---|
| ☐ Stay in the property | ☐ More time to move |
| ☐ Payment plan | ☐ Money to move out ("cash for keys") |
| ☐ Dismiss the case | ☐ Protect my rental record |
| ☐ Recover my security deposit | ☐ Compensation for bad conditions / harassment |
| ☐ Negotiated settlement / mediation | |

10.2 Hardships we should know about (children, medical, disability, job, school): _____

PART 11 — DOCUMENT CHECKLIST

Please provide copies of the following, if available. Check each item you are including.

- | | |
|---|--|
| ☐ Notice(s) from landlord | ☐ Summons & Complaint |
| ☐ Lease / rental agreement | ☐ Rent receipts / bank records |
| ☐ Repair requests & responses | ☐ Photos / videos of conditions |
| ☐ Code inspection reports | ☐ Texts / emails / letters with landlord |
| ☐ Housing assistance documents | ☐ Court filings / judgment / sheriff notice |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my eviction matter.

Signed and dated this ____ day of _____, 20__

Signature: _____

Print Name: _____

Please Print and Email to STEVE@STEVEMUELLERLEGAL.COM, or
save this document as a PDF and email to STEVE@STEVEMUELLERLEGAL.COM,
Your information will be reviewed within one hour.