



Syndicate Subscription Legal Plans

EXPUNGEMENT & RECORD RELIEF **CLIENT INTAKE QUESTIONNAIRE:**

CONFIDENTIAL. An expungement generally allows a person who has completed their sentence to withdraw a guilty plea or conviction, enter a plea of not guilty, and have the case dismissed. Other forms of relief may also be available, such as reducing a felony to a misdemeanor, sealing arrest or juvenile records, or ending probation early. Eligibility varies by state and by offense. Please list EVERY arrest and conviction, even old or out-of-state cases, so we can evaluate all options. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT:

☐ Full Legal Name: _____

Other names used (including at time of arrest): _____

Date of Birth: _____ Driver's License State (last 4): _____

Address: _____

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

Phone: _____ Email: _____

Syndicate Plan Member ID: _____ Plan Start Date: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

PART 1 — YOUR GOALS

1.1 Why are you seeking relief? (check all that apply)

☐ Employment / background checks

☐ Professional or occupational license

☐ Housing / rental applications

☐ Education / school

☐ Immigration

☐ Adoption / foster / volunteering

☐ Firearm rights

☐ Travel

☐ Peace of mind / fresh start

☐ Other

1.2 Upcoming deadline (job offer, license application, hearing): _____

1.3 Relief you are interested in:

☐ Expungement / dismissal of conviction

☐ Reduce felony to misdemeanor

☐ Early termination of probation

☐ Seal arrest record (no conviction)

☐ Seal juvenile record

☐ Cannabis conviction relief

☐ Reclassify offense under new law

☐ Certificate of rehabilitation / pardon

☐ Check for automatic relief

☐ Not sure — evaluate my record



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PART 2 — CURRENT STATUS (ELIGIBILITY SCREENING)

Relief is generally not available while you are on probation or parole, serving a sentence, or facing new charges. Answer honestly so we can evaluate timing.

2.1 Are you currently on probation, parole, or mandatory supervision? ☐ Yes ☐ No

If yes — county and expected end date: _____

2.2 Are you currently charged with any crime or on a pending case? ☐ Yes ☐ No

2.3 Are you currently serving any sentence (jail, prison, home detention)? ☐ Yes ☐ No

2.4 Are you required to register (for example, sex offender registration)? ☐ Yes ☐ No

2.5 Do you have any outstanding warrants? ☐ Yes ☐ No

PART 3 — CONVICTIONS

List each conviction separately. Code sections are shown on court records and background reports. Use additional pages if needed.

State / County / Court	Case No.	Year	Charge / Code Section	Felony / Misd.	Sentence (probation, jail, prison)

3.1 For each conviction:

Question	Yes	No	Not Sure
Did you complete probation?	☐	☐	☐
Did you ever violate probation?	☐	☐	☐
Were all fines paid?	☐	☐	☐
Was all restitution paid?	☐	☐	☐
Were classes / community service completed?	☐	☐	☐
Was the sentence served in state prison?	☐	☐	☐

In some states, unpaid fines or restitution no longer automatically prevent relief. List what is unpaid so we can evaluate.

3.2 Amount of any unpaid fines / restitution: \$ _____



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PART 4 — ARRESTS WITHOUT CONVICTION & JUVENILE RECORDS

Date of Arrest	Arresting Agency / County	Charge	Outcome (not filed, dismissed, acquitted, diversion)

4.1 Do you have any juvenile (under 18) arrests or court cases? ☐ Yes ☐ No

If yes — county, year, and outcome: _____

4.2 Did you complete a diversion or deferred entry program? ☐ Yes ☐ No

If yes, explain: _____

PART 5 — YOUR LIFE SINCE THE CONVICTION

Many forms of relief are discretionary. Information showing rehabilitation helps the court decide in your favor.

5.1 Current employer / occupation: _____ Time there: _____

5.2 Education, training, or certifications completed since the conviction: _____

5.3 Treatment, counseling, or programs completed: _____

5.4 Community service, volunteer work, faith involvement, or family responsibilities: _____

5.5 People Willing to Write a Letter of Support:

Name	Relationship	Phone / Email	Occupation

PART 6 — IMPORTANT LIMITS TO CONSIDER

6.1 Are you a non-citizen, or is your immigration status a concern? ☐ Yes ☐ No

A state expungement often does NOT remove a conviction for immigration purposes. Non-citizens should consult an immigration lawyer before relying on it.

6.2 Applying for a state license, public office, or police job? ☐ Yes ☐ No

Some applications still require you to disclose expunged convictions. Relief also may not restore firearm rights or remove driver's license consequences, and it generally does not apply to federal convictions.

6.3 Do you have any federal convictions? ☐ Yes ☐ No



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PART 7 — RECORDS & DOCUMENTS

7.1 Do you have a copy of your state DOJ record (rap sheet)? ☐ Yes ☐ No

If not, we can explain how to request one (usually through a fingerprint Live Scan). It is the most reliable list of what appears on your record.

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

- | | |
|--|--|
| ☐ State DOJ record / rap sheet | ☐ FBI record (if out-of-state) |
| ☐ Court docket / minute orders | ☐ Plea forms / sentencing orders |
| ☐ Proof of probation completion | ☐ Proof of fines / restitution paid |
| ☐ Program / class certificates | ☐ Background check reports |
| ☐ Letters of support | ☐ Job offer / license application |

Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that I have listed all arrests and convictions I am aware of. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of evaluating my eligibility for record relief.

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.