



Syndicate Subscription Legal Plans

BAIL BONDS ADVISORY **CLIENT INTAKE QUESTIONNAIRE:**

NEED HELP NOW? Bail Bonds Advisory is available 24 hours a day, 7 days a week, 365 days a year. Call (661) 505-3122 BEFORE contacting a bail bond agent or signing anything. We can take this information by phone and you can complete the rest of the form later.

CONFIDENTIAL. Syndicate Bail Bonds Advisory is included in all Syndicate Subscription Legal Plans. We help you understand your options and work with licensed bail bond agents and surety companies to seek lower fees and payment plans. The bail bond itself is issued by a licensed bail agent, not by Syndicate. Please do NOT discuss the facts of the arrest with anyone, including on jail telephones or video visits, which are usually recorded.

QUICK START — COMPLETE THIS SECTION FIRST

Arrested person's full name: _____

Date of Birth: _____ Booking Number: _____

Where is the person being held (jail / police station)? _____

City / County / State: _____

Date & time of arrest: _____ Arresting agency: _____

Charge(s) (if known): _____

Bail amount: \$ _____ Next court date / time: _____

Your name: _____ Your phone: _____

Your relationship to the arrested person: _____

Syndicate Plan Member ID: _____

PART 1 — PERSON REQUESTING ASSISTANCE

1.1 You are:

- | | |
|--|--|
| ☐ The arrested person (after release) | ☐ Family member |
| ☐ Friend | ☐ Employer |
| ☐ Other | |

Full Name: _____

Address: _____

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

Phone: _____ Alt. Phone: _____

Email: _____

Preferred method of contact:

- | | | |
|--------------------------------|-------------------------------|--------------------------------|
| ☐ Phone | ☐ Text | ☐ Email |
|--------------------------------|-------------------------------|--------------------------------|

Best times to reach you: _____



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1.2 Are you willing to sign as a co-signer (indemnitor) on the bail bond? ☐ Yes ☐ No

A co-signer (indemnitor) guarantees the arrested person will attend court and can be responsible for the FULL bail amount, plus costs, if the person fails to appear.

PART 2 — ARRESTED PERSON (DEFENDANT)

Last Name: _____ First: _____ Middle: _____

Other names used / nicknames: _____

Date of Birth: _____ Age: _____ Phone: _____

Home Address: _____

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

Time at this address: _____ Lives with: _____

Employer: _____ Time employed: _____

Employer Phone: _____ Job Title: _____

Driver's License / State ID No. and State: _____

Height: _____ Weight: _____ Hair: _____ Eyes: _____

Close local ties (spouse, children, relatives nearby, school, property owned, how long in the area): _____

2.1 Any medical needs or medications while in custody? ☐ Yes ☐ No

If yes, describe: _____

PART 3 — ARREST & CUSTODY DETAILS

3.1 Facility name: _____ Facility phone: _____

Facility address: _____

3.2 Type of charge(s):

☐ Felony ☐ Misdemeanor ☐ Both ☐ Not sure

3.3 Charge(s) / code sections (as listed on booking record): _____

3.4 Bail status:

☐ Bail has been set ☐ Bail not yet set / waiting for court

☐ No bail (held without bail) ☐ Not sure

Total bail amount: \$ _____ Number of separate bails / cases: _____

3.5 Are there any holds that could prevent release even if bail is posted?

☐ Probation / parole hold ☐ Warrant from another county / state

☐ Immigration detainer ☐ None known

☐ Not sure



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3.6 Court name / location: _____

Case Number: _____ Next court date / time: _____

3.7 Was the person released on citation or own recognizance, or could they be? ☐ Yes ☐ No

For some charges, a person may be released on a citation or without bail. Check with us before paying for a bond.

PART 4 — HISTORY RELEVANT TO BAIL

Bail agents and surety companies review this information to decide whether, and on what terms, they will write the bond.

4.1 Has the person been arrested before? ☐ Yes ☐ No

4.2 Has the person ever missed a court date or had a bail forfeited? ☐ Yes ☐ No

If yes, explain: _____

4.3 Is the person currently on probation or parole? ☐ Yes ☐ No

If yes — county and officer name: _____

4.4 Does the person have pending cases or open warrants elsewhere? ☐ Yes ☐ No

If yes, explain: _____

4.5 Does the person travel frequently or have ties outside the area? ☐ Yes ☐ No

If yes, explain: _____

PART 5 — LEGAL REPRESENTATION

5.1 Does the person have a lawyer?

☐ Has a private criminal defense lawyer ☐ Public defender appointed / expected

☐ No lawyer yet ☐ Not sure

Lawyer name / firm / phone: _____

5.2 Would you like a referral to a criminal defense lawyer? ☐ Yes ☐ No

5.3 Would you like to explore asking the court to lower the bail amount? ☐ Yes ☐ No

Requests to reduce bail or for release without bail are made to the court, usually at arraignment or a bail review hearing, through the person's defense lawyer.

PART 6 — PAYMENT, CO-SIGNERS & COLLATERAL

6.1 How would you like to post bail?

☐ Post the full bail amount in cash ☐ Bail bond through a licensed bail agent

☐ Property bond (real estate) ☐ Not sure — please advise

Cash bail is generally returned at the end of the case if the person attends every court date. A bail bond premium (commonly 8%–10% of the bail) is a non-refundable fee, even if the case is dismissed.



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6.2 Amount available now for a down payment: \$ _____ Due date: _____

6.3 Would you need a payment plan for the remaining premium? ☐ Yes ☐ No

If yes, preferred schedule:

☐ Weekly ☐ Every two weeks ☐ Monthly

Amount you can pay per installment: \$ _____

6.4 Do any of these apply to the person or co-signer? (may qualify for a lower rate)

☐ Union member ☐ Military / veteran ☐ Private lawyer retained
☐ Homeowner ☐ None of these

6.5 Proposed Co-Signers (Indemnitors):

Name	Relationship	Phone	Employer / Monthly Income	Homeowner?

6.6 Collateral Available (if required):

Type (real estate, vehicle, cash, jewelry, other)	Owner	Est. Value \$	Loans / Liens \$

PART 7 — BAIL AGENTS ALREADY CONTACTED

7.1 Have you already contacted a bail bond agent? ☐ Yes ☐ No

Agent / company name: _____ License No.: _____

Phone: _____ Quoted premium rate / amount: _____

7.2 Have you signed any documents or paid any money yet? ☐ Yes ☐ No

If yes, explain: _____

Please send us copies of anything you have signed. Do not sign additional documents until we have reviewed your options.

PART 8 — ACKNOWLEDGMENTS

Please check each item to confirm you understand.

☐ The arrested person must attend EVERY court date. Missing court can result in a new warrant and forfeiture of bail.

☐ A bail bond premium is not refunded, even if charges are dropped or the person is found not guilty.



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☐ Co-signers (indemnitors) may be responsible for the full bail amount and collateral may be lost if the person fails to appear.

☐ The bail bond is written by a licensed bail agent / surety company. Syndicate provides advisory services and negotiation support.

☐ Lower fees and payment plans depend on the bail agent's approval and are not guaranteed.

PART 9 — DOCUMENT CHECKLIST

Have these ready for the bail agent. Check each item you are including.

☐ Photo ID for each co-signer

☐ Proof of residence (utility bill / lease)

☐ Proof of income (pay stubs)

☐ Booking information / printout

☐ Collateral documents (deed, vehicle title)

☐ Any documents already signed

☐ Union / military ID (if applicable)

☐ Defense lawyer information

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 providing bail bonds advisory services.

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.