



Syndicate Subscription Legal Plans

LEGAL NAME CHANGE **CLIENT INTAKE QUESTIONNAIRE:**

SAFETY FIRST: If you are changing your name to escape domestic violence, stalking, or other threats, tell us before anything is filed. Courts can often waive newspaper publication and keep your new name and address confidential.

CONFIDENTIAL. Most court name changes involve filing a petition, publishing notice (unless an exception applies), and a court hearing. In some situations, such as marriage or divorce, a name may be changed without a separate court petition. Procedures vary by state. If a question does not apply, write "N/A." If unknown, write "Unknown."

NAME OF THE CLIENT (PETITIONER):

This form is for:

☐ An adult changing my own name

☐ A parent changing a child's name

☐ Both

☐ Petitioner's Current Legal Name: _____

Date of Birth: _____ Place of Birth (city, state, country): _____

Address: _____

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

Time living in this county / state: _____

Phone: _____ Email: _____

Syndicate Plan Member ID: _____

Preferred method of contact:

☐ Phone

☐ Text

☐ Email

Is it safe to contact you at the phone, email, and address above?

☐ Yes ☐ No

PART 1 — CURRENT & PROPOSED NAMES

Person	Current Legal Name (first, middle, last)	Proposed New Name (first, middle, last)

1.1 Other names previously used: _____

1.2 Are you also requesting a change of gender marker?

☐ Yes ☐ No



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PART 2 — REASON FOR THE NAME CHANGE

2.1 Check all that apply:

☐ Marriage / domestic partnership

☐ Divorce / return to former name

☐ Personal identity / preference

☐ Gender identity

☐ Religious or cultural reasons

☐ Safety (domestic violence, stalking, threats)

☐ Family unity (e.g., child to match parent)

☐ Other

2.2 Briefly explain the reason (this may be included in the petition): _____

PART 3 — YOU MAY NOT NEED A COURT PETITION

3.1 Did you recently marry, or are you about to marry?

☐ Yes ☐ No

A new name can often be chosen on the marriage license and used with that certificate.

3.2 Is there a divorce or annulment case pending or completed?

☐ Yes ☐ No

A former name can usually be restored in the divorce case itself, even after the judgment, without a separate name change case.

If yes — court, case number, and date of judgment: _____

PART 4 — REQUIRED DISCLOSURES

Name change petitions ask about certain legal matters. Answer yes or no; we will discuss details privately.

4.1 Are you currently on parole or probation, or in state prison or jail?

☐ Yes ☐ No

4.2 Are you required to register as a sex offender?

☐ Yes ☐ No

4.3 Do you have any pending criminal charges?

☐ Yes ☐ No

4.4 Is anyone likely to object to the name change?

☐ Yes ☐ No

If yes, explain: _____

A name change may not be used to avoid debts, legal obligations, or to commit fraud.

PART 5 — MINOR CHILDREN

Child's Current Name	Date of Birth	Age	Lives With



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Parent Information	Parent 1	Parent 2
Full name		
Address / city / state		
Phone		
Consents to name change?		
Whereabouts unknown?		

If both parents do not sign the petition, the non-signing parent generally must be given notice, and the court will decide based on the child's best interest.

5.1 Is there a custody or guardianship order for the child? ☐ Yes ☐ No

5.2 Is the child 12 or older? What does the child want? ☐ Yes ☐ No

If yes, explain: _____

PART 6 — SAFETY & PRIVACY

6.1 Are you seeking the change because of domestic violence, stalking, or threats? ☐ Yes ☐ No

6.2 Are you enrolled in an address confidentiality program? ☐ Yes ☐ No

6.3 Privacy protections you want to request:

☐ Waive newspaper publication

☐ Keep new name / address confidential

☐ Seal court records

☐ Not needed

PART 7 — AFTER THE NAME CHANGE

After the court order is issued, you will need to update your records. Check the ones you would like help with.

☐ Social Security card

☐ Driver's license / state ID

☐ Passport

☐ Birth certificate

☐ Bank / credit accounts

☐ Employer / payroll

☐ School records

☐ Professional licenses

☐ Voter registration

☐ Insurance / medical records

PART 8 — DOCUMENT CHECKLIST

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

☐ Photo ID

☐ Birth certificate(s)

☐ Marriage certificate

☐ Divorce judgment

☐ Custody / guardianship orders

☐ Restraining orders (if safety-related)

☐ Safe at Home enrollment (if any)

☐ Other parent's signed consent



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Certification:

I declare that the information provided in this questionnaire is true, correct, and complete to the best of my knowledge, and that the name change is not sought for any fraudulent purpose. I understand this information is provided to Syndicate Subscription Legal Plans in confidence for the purpose of my name change matter.

Signed and dated this ____ day of _____, 20____
Signature (Petitioner): _____

Print Name: _____

Signature (Other Parent): _____

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.