

Privacy and contact preferences

Unsigned preparation draft - review the complete document before use.

Blank W form - enter reviewed information only.

Record the customer choices for this matter.

Contact

Your full name

Contact email

Contact phone

Details

Matter or property

Plan

Service contact preference (Email / Phone / Either)

Marketing preference (No marketing / Separate express marketing consent given)

Provider introduction preference (W-only contact / Discuss before sharing / Specific provider sharing requested)

Privacy and contact preferences

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Plan

Exact information and named recipient requested for sharing

Withdrawal or correction request

Timing

Date recorded