

kec (first) \_\_\_ drt \_\_\_ **D** cb \_\_\_ rac \_\_\_ pjf \_\_\_ mcg \_\_\_ raj \_\_\_ naf \_\_\_ **D** jlk \_\_\_ rls \_\_\_ dbr \_\_\_ sml \_\_\_

**Bookkeeping:**

- open new billing file/subfile
- bill to file no. \_\_\_\_\_

**CLIENT/CASE MAINTENANCE**

Client No. 11187.001  
 Case No.  
 Date Added: 11/16/2007

CLIENT NAME: Simon & Shirley Bernstein

Address: 7020 Lions Head Lane,

City: Boca Raton State: FL Zip: 33496

Business Phone: Home Phone:

Fax Phone:

Contact Name: Simon & Shirley Bernstein

Referral Source:

Originating Attorney: DRT

Primary Attorney: DRT

Secondary Attorney: RLS

Category Code: Rate Code:

CASE NAME: Bernstein, Shirley & Simon  
Estate Planning

Fee Type: Bill Type:

Related Cases:

Engagement Letter:

Retainer: Fees: Costs: \$

Notes:

Related Parties:

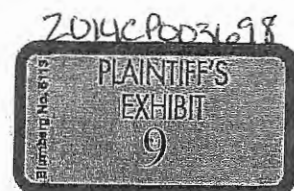
Name:  
 Addr:  
 Tel. No.:  
 Fax No.:  
 Relationship:

Opposing Parties:

Name:  
 Addr:  
 Tel. No.:  
 Fax No.:  
 Relationship:

Name:  
 Addr:  
 Tel. No.:  
 Fax No.:  
 Relationship:

Name:  
 Addr:  
 Tel. No.:  
 Fax No.:  
 Relationship:



**P9** 12-15-15

TS003232