

Name: \_\_\_\_\_ Age \_\_\_\_\_ Date: \_\_\_\_\_

Name: \_\_\_\_\_ Age \_\_\_\_\_ Date: \_\_\_\_\_

Children: \_\_\_\_\_ Household Size: \_\_\_\_\_

Prior Bankruptcy? \_\_\_\_\_ Location: \_\_\_\_\_

Case Information: \_\_\_\_\_ Chapter 7 \_\_\_\_\_ Chapter 13 \_\_\_\_\_ Chapter 11 Fee Quote: \$ \_\_\_\_\_

How did client find us? \_\_\_\_\_ Lawsuit Letter \_\_\_\_\_ Yellow Pages \_\_\_\_\_ Referral \_\_\_\_\_ Internet

Home Phone # \_\_\_\_\_ Work Phone: \_\_\_\_\_ Cell Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Employer: \_\_\_\_\_ Position \_\_\_\_\_ Pay Rate: \_\_\_\_\_

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Other Income: Social Security \_\_\_\_\_ Child Support \_\_\_\_\_ Other: \_\_\_\_\_

Own real estate? ( YES / NO )

When was house purchased? \_\_\_\_\_ Purchase Price \$ \_\_\_\_\_ Payment: \_\_\_\_\_

What is home worth today? \$ \_\_\_\_\_ Appraisal? Yes / No

Homestead Exemption? (Married in home? Minor children in home? \_\_\_\_\_

1st Mortgage Balance: \$ \_\_\_\_\_ Pymt \_\_\_\_\_ Current? Yes / No. Arrearage Amount \$ \_\_\_\_\_

2nd Mortgage Balance \$ \_\_\_\_\_ Pymt \_\_\_\_\_ Current? Yes / No Arrearage Amount \$ \_\_\_\_\_

Tax Returns:

1. Are all tax returns filed? Yes / No
2. If not, which years are not filed? \_\_\_\_\_
3. Any taxes owed? Yes / No If so, how much? \$ \_\_\_\_\_

Student Loans? Yes / No If so, how much is owed? \$ \_\_\_\_\_

Child Support Order? Yes / No If so, is there an arrearage? Yes / No How much? \_\_\_\_\_

Relatives: Do you owe any relatives money? Yes / No Have you paid any relatives money in the past year? Yes / No

New Debts: Any new debts, loans, balance transfers, or charges in last couple months? Yes / No \_\_\_\_\_

Auto: Vehicle 1: \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Vehicle 2:: \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Vehicle 3: \_\_\_\_\_ Loan Balance \$ \_\_\_\_\_

Unsecured Debt Total: (Medical/Credit Cards) \$ \_\_\_\_\_

Any Lawsuits? \_\_\_\_\_ Garnishments? \_\_\_\_\_

\_\_\_\_\_  
\_\_\_\_\_