

CONSUMER BANKRUPTCY CLIENT INTAKE SHEET

Your Name: _____

Home Address: _____

City _____ State _____ Zip _____

County _____

How long have you lived in this state? _____

Marital Status (circle one): Single Married Separated Divorced

Number of people in household: _____

Number of dependants: _____ Ages _____

Phone Number(s): (home) _____ (cell) _____

(work) _____

Email Address: _____ Soc Sec # _____

DOB _____

Name of Employer _____

Occupation _____

How long have you been with this employer? _____

What is your annual income? _____

What is your spouse's annual income? _____

What's the best way to reach you? _____

Have you ever filed bankruptcy before? Yes No If yes, on what date? _____

Any repossessions in the past year? If so, what and when? _____

Please tell us about your debt:

APPROXIMATELY HOW MUCH TOTAL DEBT DO YOU HAVE IN THESE AREAS:

Place a "*" next to the items that are delinquent.

Credit Cards \$ _____

Lawsuits \$ _____

Real Property \$ _____

Vehicle(s) \$ _____

Taxes \$ _____

Student Loans \$ _____

Medical Bills \$ _____

Other Debt – Explain _____

Have you incurred any new debt/used credit cards in the last 90 days? Yes _____ or No _____

If so, what kind and how much? _____

WHAT PROPERTY/ASSETS DO YOU OWN?

Check all that apply.

_____ House or other real estate. Current market value \$ _____

_____ Mortgages on real estate

_____ Are you behind on mortgage payments? If so, how many months and dollar amount?

_____ Value of autos in your possession \$ _____

Make/Model/Year of car(s) _____

Mileage _____

Describe any valuable personal property, including jewelry, collectibles and antiques: _____

Retirement accounts or Cash Value Insurance: _____

Total cash in bank accounts (please list each account): _____

Total cash in stocks, bonds, etc. _____

How did you hear about me? (please circle) Google Yahoo Craigslist
Referral _____ Lawyers.com Other

Credit counseling course: www.consumerbankruptcycounseling.info

Financial management course: www.beadviser.com