

Please fill out the following information sheet and bring it with you to your free consultation with one of our lawyers. By filling out this intake sheet at home you will save time at the office and the lawyer will be able to give you better legal advice. If you do not know the exact answer, please give your best estimate.

Client Intake Sheet

Basic Information

Date: _____

Full Name: _____

Social Security No: _____ D.O.B: _____

Street Address: _____

City: _____ State: _____ Zip: _____

Mailing Address: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

Email address: _____

Spouse's Name (if applicable): _____

Social Security No: _____ D.O.B: _____ Phone No: _____

Address: _____ Mailing Address: _____

City: _____ State: _____ Zip: _____

Are you a member of a Legal Insurance Plan? Yes ____ **No** ____

Hyatt ____ Legal Access ____ Legal Resources ____ Other ____

Automobiles

1. How many cars do you have? _____
2. List the year/make/model of each car that you own:

3. How much do you owe (total or payoff balance) on each car? \$ _____
4. What is your total monthly car payment (on each car)?

Real Estate

5. How many pieces of real estate (houses, land, etc.) do you own? _____
6. What is your monthly house payment or rent? \$ _____
First Mortgage payment: \$ _____
Second Mortgage payment \$ _____
7. If you own a house, then what is the total amount you owe on it? (First and second mortgages) \$ _____
8. How much is the city tax assessment for your house? \$ _____
9. How much do you think your house is worth? \$ _____
10. Is your house in foreclosure? Yes / No. How many months are you behind? _____
11. Do you want to keep your house? Yes / No

Debt

12. How many different creditors do you have? _____
13. What is your total credit card debt? (estimate) \$ _____
14. What is your total medical debt? _____
15. What is your total overall debt? (estimate) \$ _____
16. Do you want to file a Chapter 7 or Chapter 13 Bankruptcy? (Circle One)
17. What is your main reason for your wanting to file a bankruptcy?
18. Estimate how much you owe in each of the following categories:

Child Support: \$ _____	Back Taxes: \$ _____
Student Loans: \$ _____	Mortgage Arrears: \$ _____
Furniture: \$ _____	Jewelry: \$ _____

Income

18. Where do you work and how much money do you make per month?

_____ \$ _____

Where does your spouse work and how much does your spouse make per month?

_____ \$ _____

19. List all sources of income (including retirement, social security, subsidies, part time work, unemployment, etc.) and monthly amounts:

20. List you and your spouse's gross income for the past three years.

21. List all current garnishments on your wages or bank accounts:

Miscellaneous

22. List all Judgments or liens against you:

23. How much of a tax refund did you receive? \$ _____

24. What did you spend it on? _____

25. Did you give any of your tax refund to friends or family?

26. Is this going to be Single or Joint (with your spouse) Bankruptcy? (Circle One)

27. Do you have any stocks, bonds, mutual funds, 401K or retirement plans or any other assets of value?

28. Have you lived in Virginia for at least two (2) full years? (circle one) YES NO

29. List all states in which you have lived in the last two (2) years:

30. List the name, age, job, income level, and your relationship to every person living in the house with you, whether or not they are related to you.

Name	Age	Job	Income	Relationship
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31. Have you transferred an asset or property out of your name in the last 2 years? If so, describe what you transferred and when.

32. How many bankruptcies have you filed (even if you did not finish them, or receive a discharge), and what were the dates that you filed them?

33. Have you taken any cash advances from credit cards over \$750.00 in the last 90 days? If so list the date, amount and credit card that you took the cash advance(s) on.

34. Have you purchased and luxury items (jewelry, furs, vacations, recreational equipment, etc.) in the last 90 days? If so, describe and date.

35. Have you purchased an automobile, boat, or mobile home (any titled vehicle) in the last 90 days? If so, list the date, make/model/year, location of purchase, and amount financed.
