

INTAKE WORKSHEET

If a question does not apply to you, please mark it "N/A"

Name:	Spouse:
Address:	Address:
Cell phone #:	Cell phone #:
Home phone #:	Home Phone #:
Email:	Email:
Email secure (can we use this email address in complete privacy)?	Email secure?
How did you find our firm?	Referred By:

LIQUID ASSETS

1. Checking account balance: \$ _____ (approximate total)
2. Savings account balance: \$ _____ (approximate total)
3. Retirement accounts total: \$ _____ (approximate total)

REAL ESTATE (real estate is dirt; like a house, or a building, or a piece of land)

_____ \$ _____
 Property Address Estimated value (Zillow.com or a rough estimate)

Debts	Lender Name	Total balance due	Monthly Payment	# of payments behind
1 st Mortgage		\$	\$	
2 nd Mortgage		\$	\$	
3 rd Mortgage		\$	\$	
HOA		\$	\$	

Trustee's Sale date (if any): _____ Current desire (keep or surrender): _____

***Additional Properties** (same questions apply; please use another piece of paper if you have more than one parcel of real property)

MOTOR VEHICLES AND RECREATIONAL VEHICLES

Vehicle #1

_____ \$ _____
Description (Year, Make, and Model) Kelley Blue Book Value Creditor name
(See www.kbb.com)

\$ _____ \$ _____
Total balance due Monthly payment # of payments behind

Current desire (keep or surrender property): _____

Vehicle #2

_____ \$ _____
Description (Year, Make, and Model) Kelley Blue Book Value Creditor name
(See www.kbb.com)

\$ _____ \$ _____
Total balance due Monthly payment # of payments behind

Current desire (keep or surrender property): _____

***Additional Vehicles** (same questions apply; It is particularly important that we know how many cars you have, and how much equity you have in each car. If your child's car is still in your name, or you are on your parent's vehicle for estate planning purposes, list that car here so we can discuss it.)

ADDITIONAL DEBT ESTIMATES (note that you must list all your debts on your final bankruptcy Schedules: it is a crime to intentionally fail to do so! What you are filling out here are not your Schedules, but this information is intended to give us an idea of whether we can help you):

1. Tax Debt: \$ _____ (these probably won't be discharged, but you have to list them anyway!)
2. Student Loans: \$ _____ (these will not be discharged, but you must list them anyway!)
3. Child support or alimony: \$ _____ (ditto; you'll keep both kinds of debt, but must list them)
4. Unsecured: \$ _____ (such as credit card debt, medical bills and personal loans)
 - a. Approximately how many unsecured creditors do you have? _____
 - b. Approximately how much do you pay per month to unsecured creditors? \$ _____
5. Other Debts: \$ _____ (to be consistent, I'll tell you that you must list them!)

LITIGATION

Are you currently involved in any lawsuits? _____ Case No. of lawsuit: _____

Name of creditor involved: _____ Date served: _____

Has a judgment been entered against you? _____ Are you being garnished? _____

INCOME

1. Your annual gross income from employer: \$ _____ (gross; that's before deductions)

Name of Employer(s): _____

2. Spouse's annual gross income from employer: \$ _____ (gross; that's before deductions)

Name of Employer(s): _____

3. Income from operation of a business: Monthly: \$_____ Total in last 6 months: \$_____
4. Income from social security: Monthly: \$_____
5. Income from pension: Monthly: \$_____
6. Income from unemployment: Monthly: \$_____
7. Number of People Living in Your Home (including you): _____ If the other household members are contributing to expenses, approximately how much (per month)? \$_____

BUSINESS OWNERSHIP

Do you own a business: _____ Business Name: _____
 Corporation LLC Partnership DBA/Sole Proprietorship

If you just closed down your business, please advise the closure date: _____

Current Desire (keep or close): _____

Please submit the following documents with this intake worksheet for each business you own:

1. Balance Sheet;
2. Profit & Loss Statement; and
3. Account Payable list with creditor names & amounts due to each.

GENERAL CONSIDERATIONS:

1. Have you used any of your credit cards within last 90 days? _____ If yes, how much (total)? \$_____
2. Have you taken any cash advances from credit card(s) in the last 7 months? _____
 If yes, how much (total)? \$_____
3. Have you made any payments to relatives within the last one year? _____
 Amount of payment(s): \$ _____ Date(s) of payment(s): _____ Relationship: _____
 Amount of payment(s): \$ _____ Date(s) of payment(s): _____ Relationship: _____
4. Have you ever filed bankruptcy before? _____
 If yes, when? _____ What chapter? _____ Where? _____
5. Are you married? _____ If yes, what was the date of your marriage: _____
6. Have you been divorced in the past two years? _____
 If yes, please provide a copy of your Divorce Decree (and Property Settlement Agreement, if separate) with this Intake Worksheet.
7. Have you lived in Arizona for a FULL two years? _____
 If not, what date did you move to Arizona: _____ From what state: _____

LAST QUESTIONS

1) Is there anything special/extraordinary/unusual we should know before we decide if we can help you?

2) What do you wish to achieve for yourself and your family?

