

Today's Date \_\_\_\_\_

Interviewed by: \_\_\_\_\_

## NEW CLIENT INTAKE FORM

Name: \_\_\_\_\_ Age \_\_\_\_\_  
*Last First Middle*

Spouse: \_\_\_\_\_ Age \_\_\_\_\_  
*Last First Middle*

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

How did you find our office? \_\_\_\_\_ Yellow Pages \_\_\_\_\_ Received Letter \_\_\_\_\_ Referred by Friend/Family  
\_\_\_\_\_ Referred by Attorney \_\_\_\_\_ Internet \_\_\_\_\_ Past Client \_\_\_\_\_ Other

Have you lived at this address for at least 180 days?  No  Yes

Have you lived in this state for at least 730 days (2 years)?  No  Yes List prior state: \_\_\_\_\_

If you have a different mailing address, please list:

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

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Spouse Address: *(if different from your address)*: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

Telephone Numbers: Home: \_\_\_\_\_

Work: \_\_\_\_\_ Spouse Work #: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Spouse Cell: \_\_\_\_\_

Email Address: \_\_\_\_\_ Spouse Email: \_\_\_\_\_

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

Marital Status:

- Married
- Single
- Divorced
- Separated
- Widowed

List all **dependents** of you and your spouse, their ages, and their relationship to you:

Name	Age	Relationship
1. _____		
2. _____		
3. _____		
4. _____		
5. _____		
6. _____		

### Prior/Pending Bankruptcy Cases

Has a bankruptcy case been filed by you or against you in the last 8 years?  No  Yes

Date filed: \_\_\_\_\_ . In which state was the case filed? \_\_\_\_\_

### Real Estate:

Are you purchasing a home or renting?  Renting  Purchasing

If you are purchasing the home, what year did you purchase the home? \_\_\_\_\_.

Have you ever resided in this home with a spouse or with your minor children?  No  Yes

What is the value of the home today? \$ \_\_\_\_\_

Balance of 1<sup>st</sup> Mortgage: \$ \_\_\_\_\_ . Monthly payment: \$ \_\_\_\_\_ . Months in Arrears \_\_\_\_\_

Balance of 2<sup>nd</sup> Mortgage: \$ \_\_\_\_\_ . Monthly payment: \$ \_\_\_\_\_ . Months in Arrears \_\_\_\_\_

**Child Support:** Do you pay child support? \_\_\_\_\_ Are you current on Child Support? \_\_\_\_\_

### Tax Returns:

Have you filed all required Income Tax Returns?  No  Yes

If not, what years are not filed? \_\_\_\_\_

How much do you owe the IRS? \$ \_\_\_\_\_

How much do you owe in state income taxes? \$ \_\_\_\_\_ What state? \_\_\_\_\_

### Student Loans:

Do you owe student loans? \_\_\_\_\_ How much? \_\_\_\_\_

### Credit Cards & Medical Bills/Unsecured Debt:

How much do you owe in Credit Cards? \$ \_\_\_\_\_ Medical Bills: \$ \_\_\_\_\_

**Lawsuits & Garnishments:** Have you been sued? \_\_\_\_\_

Are you being garnished? \_\_\_\_\_

## Vehicles:

Year & Make of Vehicle	Estimated Mileage	Loan Balance	Current on Loan (yes or no)

## Income & Employment:

### Part A. Debtor's Income

1. What is your occupation? \_\_\_\_\_
  2. Name and address of your employer:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
  3. How long have you been employed there? \_\_\_\_\_
  4. How often do you get paid?    once a week  
 every two weeks                    twice a month  
 once a month                    \_\_\_\_\_  
 other \_\_\_\_\_
  5. What is the hourly pay rate \$ \_\_\_\_\_/hour
  6. What is your yearly salary? \$ \_\_\_\_\_
  - b) income from **real estate** property? If so, how much per month?   No   Yes \$ \_\_\_\_\_
  - c) interest or dividends? If so, how much per month?   No   Yes \$ \_\_\_\_\_
  - d) alimony or family support payments for your use or for the care of your dependents? If so, how much per month?   No   Yes \$ \_\_\_\_\_/month
  - e) social security or other forms of monetary government assistance?   No   Yes \$ \_\_\_\_\_/month
  - f) retirement or pension money?   No   Yes \$ \_\_\_\_\_
- Do you have any other sources of income not listed?
- 2<sup>nd</sup> Job?   No   Yes \$ \_\_\_\_\_/hour
- Other: \_\_\_\_\_

### Part B. Joint Debtor's Income

1. What is your occupation? \_\_\_\_\_
  2. Name and address of your employer:  
 \_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_
  3. How long have you been employed there? \_\_\_\_\_
  4. How often do you get paid?    once a week  
 every two weeks                    twice a month  
 once a month                    \_\_\_\_\_  
 other \_\_\_\_\_
  5. What is the hourly pay rate \$ \_\_\_\_\_/hour
  6. What is your yearly salary? \$ \_\_\_\_\_
  - b) income from **real estate** property? If so, how much per month?   No   Yes \$ \_\_\_\_\_
  - c) interest or dividends? If so, how much per month?   No   Yes \$ \_\_\_\_\_
  - d) alimony or family support payments for your use or for the care of your dependents? If so, how much per month?   No   Yes \$ \_\_\_\_\_/month
  - e) social security or other forms of monetary government assistance?   No   Yes \$ \_\_\_\_\_/month
  - f) retirement or pension money?   No   Yes \$ \_\_\_\_\_
- Do you have any other sources of income not listed?
- 2<sup>nd</sup> Job?   No   Yes \$ \_\_\_\_\_/hour
- Other: \_\_\_\_\_

Are you or your spouse expecting any increase or decrease in salary next year? If so, explain.

