

INTAKE QUESTIONNAIRE

Debtor

Name: _____ Phone No: _____

Social Security Number: _____ Single ___ Married ___

Address: _____

Email: _____

Are you currently employed? Yes ___ No ___

Occupation: _____ How Long? _____

Employer's Name: _____

Address: _____

Wages/salary \$ _____ weekly ___ bi-weekly ___

Other Income? Yes ___ No ___ \$ _____ per week ___ month ___

Source _____

Co-Debtor

Name: _____ Phone No: _____

Social Security Number: _____ Single ___ Married ___

Address: _____

Email: _____

Are you currently employed? Yes ___ No ___

Occupation: _____ How Long? _____

Employer's Name: _____

Address: _____

Wages/salary \$ _____ weekly ___ bi-weekly ___

Other Income? Yes ___ No ___ \$ _____ per week ___ month ___

Source _____

Have you lived at your current residence for at least 3 years?

Yes___ No___

If "No," please complete the following:

Previous Address: _____

From: _____ to _____

Previous Address: _____

From: _____ to _____

Previous Address: _____

From: _____ to _____

Any Prior Bankruptcies? Yes___ No___ If "Yes," what year _____

Any Dependants? Yes___ No___

	Dependant's Name	Age	Relation to Debtor
1.	_____	_____	_____
2.	_____	_____	_____
3.	_____	_____	_____
4.	_____	_____	_____

Do you own a home? Yes___ No___ Individually___ Jointly___

If "Yes," current value \$ _____ Total owed \$ _____

Address _____

Mortgagee _____

Do you any other real estate? Yes___ No___

Address _____ Value \$ _____

Do you own any cars? Yes___ No___

1. Year, Make and Model _____ Mileage _____

Is it financed? Yes___ No___ Lienholder _____

Name(s) on Title _____

2. Year, Make and Model _____ Mileage: _____

Is it financed? Yes ___ No ___ Lienholder _____

Name(s) on Title _____

3. Year, Make and Model _____ Mileage: _____

Is it financed? Yes ___ No ___ Lienholder _____

Name(s) on Title _____

Do you own any motorcycles, boats, or RVs? Yes ___ No ___

If Yes, Year, Model, and Condition (of each) _____

Do You have any bank accounts?

1. Bank _____ Savings ___ Checking ___

Individual ___ Joint ___ Current Balance \$ _____

2. Bank _____ Savings ___ Checking ___

Individual ___ Joint ___ Current Balance \$ _____

3. Bank _____ Savings ___ Checking ___

Individual ___ Joint ___ Current Balance \$ _____

Do you have any IRA, pension, or retirement accounts?

Debtor Yes ___ No ___ Co-Debtor Yes ___ No ___

Debtor: IRA ___ 401k ___ Other ___ Current Value: \$ _____

Co-Debtor: IRA ___ 401k ___ Other ___ Current Value: \$ _____

Estimated liquidation value (used value) of all household goods and furnishings \$ _____

Estimated liquidation value (used value) of all clothes \$ _____

Do you own any jewelry, furs, antiques, artwork? Yes___ No___
Describe:_____ Value \$_____
Do you own any firearms or musical instruments? Yes___ No___
Describe:_____ Value \$_____
Is your name on the deed to anyone else's home? Yes___ No___
If "Yes," please explain. _____

Do you have any unresolved lawsuits or future claims? Yes___ No___
If "Yes," please explain. _____

MONTHLY LIVING EXPENSES

HOME

Rent/Mortgage \$_____
Property Taxes \$_____
Home Maintenance \$_____
 Gas \$_____
 Electric \$_____
 Water \$_____
 Phone \$_____
Cellphone \$_____
Internet \$_____
 Cable \$_____
Food/supplies \$_____
Childcare \$_____
 Tuition \$_____
Gasoline \$_____

VEHICLES(S)

Maintenance/Car Repairs \$ _____

Car insurance \$ _____

Car payments \$ _____

Alimony/child support \$ _____

Student loan payments \$ _____

Life Insurance payments \$ _____

Tax Payments to IRS \$ _____

Alarm Service \$ _____

Pest Control \$ _____

Charitable donations \$ _____

Any anticipated changes in income? (If yes,
describe) _____

Any anticipated changes in expenses (If yes,
describe) _____

Have you sold any real property, vehicles, boats, RVs, etc. in the last
six years? Yes ___ No ___ Date of Transfer _____

Person(s) who received transfer _____

Description of Property _____

Value of Property Transferred _____

How much did you receive at closing (after all costs)? _____

How did you spend the proceeds? _____

Did you pay back a family member in past year? Yes ___ No ___