

CLIENT INFORMATION

INFORMATION ABOUT YOU:

TODAY'S DATE:

Name:								
Any other names you may be known by:								
SS#				Date of Birth				
Physical Address								
Mailing (if different)								
City				State		Zip		
Phone #s	Hm			Cell			Wk	
E-mail address								

SPOUSE INFORMATION

Name								
Any other names you may be known by								
SS#				Date of Birth				
Physical Address								
Mailing (if different)								
City				State		Zip		
Phone #s	Hm			Cell			Wk	
E-mail address								

How did you hear about us? Circle

PHONE BK	TV	RADIO	PAPER	INTERNET	(Where)	
REFERRED BY:				OTHER		

OFFICE USE ONLY

Married / Single	Individual / Joint	CH 7 13	SHELL	AB SPA	Y	N
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FORECLOSURE Pending Occurred	REPOSSESSION Pending Occurred	EMPLOYMENT <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 12.5%; border: 1px solid black;">940</td> <td style="width: 12.5%; border: 1px solid black;">1099</td> <td style="width: 12.5%; border: 1px solid black;">Sched C</td> <td style="width: 12.5%; border: 1px solid black;">Unemp</td> <td style="width: 12.5%; border: 1px solid black;">Ret.</td> <td style="width: 12.5%; border: 1px solid black;">Dis.</td> </tr> </table>	940	1099	Sched C	Unemp	Ret.	Dis.
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PRIOR BKs	0	1	2	3	4	S.O.B.s	M.T.E.	13 DP: \$
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REAFFIRMATIONS _____ **HOMEWORK GIVEN** Y N **7 RETAINER \$** _____

NOTES:

Do you or your spouse pay or owe child support or alimony?			
Do you or your spouse owe any overdue child support or alimony?		How much?	
Are your wages being garnished to pay current child support or alimony?			
Are your wages being garnished to pay past-due child support or alimony?			
Have you filed for bankruptcy in the last 10 years?		How many times?	
Do you have an account w/ Attorney General?			
Do you owe money to the IRS?		How Much?	
Have you had a bankruptcy case dismissed in the last 12 months?			
If yes, describe the changes that have occurred which will enable you to be successful this time:			

IMPORTANT QUESTIONS

PLEASE CIRCLE YES OR NO TO EACH OF THESE QUESTIONS. SOME QUESTIONS REQUIRE ADDITIONAL INFO

- YES NO Is anyone threatening to take your house, car, truck? _____
- YES NO Do you have any outstanding payday loans?
- YES NO Do you have anything in your possession that belongs to someone else?
- YES NO Does anyone have anything in their possession that belongs to you?
- YES NO Do you have any property in your name that really belongs to someone else?
- YES NO Have you sold or transferred any property worth more than \$500 in the last 2 years?
- YES NO Have you made any purchases in the last 90 days for more than \$500?
- YES NO Have you taken out any loans, cash advances, or balance transfers in the last 90 days?
- YES NO Have you paid back friends or relatives more than \$1000 in the last 2 years?
- YES NO Has any creditor ever taken back, repossessed or foreclosed on you car, truck or home?
- YES NO Do you receive money from a trust or annuity? _____
- YES NO Are you separated from your spouse or are you contemplating separation?
- YES NO Are you required to pay any debts under a separation agreement or divorce decree?
- YES NO Did you transfer any property to your former spouse?
- YES NO Do you have more than two cars? How many total? _____
- YES NO Have you had any car accidents in the last 4 years that were your fault?
- YES NO Are any of your debts being paid by payroll deduction or military allotment?
- YES NO Have you given any loan company a list of your household goods?
- YES NO Have you listed any motor vehicles as collateral for a personal loan?
- YES NO Has anyone co-signed a loan for you?
- YES NO Has anyone put up a CD, savings account or car so you could get a loan?
- YES NO Has anyone served you with any court papers in the last 4 years?
- YES NO Does anyone have a judgment against you?
- YES NO Have you owned a business at any time in the last 3 years?
- YES NO If so, do you owe any taxes because of that self-employment? Sales or Employment

- YES NO** Are there any tax returns that you have not filed? Which ones? _____
YES NO Do you owe any federal or state income taxes?
YES NO Do you owe any real estate or personal property taxes?
YES NO Are your wages being garnished to pay back taxes?
YES NO Do you owe money where you currently bank?
YES NO Do you expect any gifts or inheritances in the next 12 months? Named in a will?
YES NO Do you have any unpaid student loans?
YES NO Have you ever filed bankruptcy before? When? _____ How many times? ____
YES NO Have you paid more than \$600 to any one creditor in the last 90 days?
YES NO Do you have any pending car accident, workers comp, or other personal injury claims?
YES NO Do you pay on a contract for deed, lease, rent-to-own or other contract?
YES NO Do you owe any Court ordered restitution or fines? _____
YES NO Have you been convicted of a DWI? Was anyone injured? _____
YES NO Do you have any unpaid bad checks? Total amount of the checks _____
YES NO Have you moved within the last 3 months?
YES NO Have you transferred or given away any asset worth \$5,000 or more in the last 4 years?
YES NO Have you lived in the State of Texas for the last 4 years?
YES NO Did you make an unusually large down payment on any property?

PROPERTY

Value= What you could sell property for

Owed= Current payoff amount

REAL ESTATE

Type	Value	Owed	Payment	\$ Behind	Name of Creditor
Single Family Home					
Condo/Townhome					
Timeshare					
Land					

Do you have a VA or FHA loan? _____

MOBILE HOME

Make	Year	Model	Size	Value	\$ Owed	Creditor

MOTOR VEHICLES/BOATS/OTHER VEHICLES

Make	Year	Model	Mileage	NADA	\$ Owed	Creditor

CASH AND ACCOUNTS		
Type	Dollar Amount	Description/Explanation(List all account #s)
Cash		
Checking account		
Business cking		
Savings		
Money owed to you		
All other financial accounts		
Stocks		
Rent rec'd		
Receivables		
Tax refunds		

OTHER PROPERTY			
Type	Value	Description	Owe \$ on this?
Business ownership			
Inventory			
Tools of trade			
Antiques/jewelry			
Valuable collections			
Personal injury claim			
Other items of value			

BUDGET

MARITAL STATUS (CIRCLE): Married Single Divorced Separated Widowed

EMPLOYMENT		
	Debtor	Spouse
Occupation		
Employer		
Employer address		
City, State Zip		
How long?		

DEPENDENTS		
Name	Age	Relationship

INCOME FROM REGULAR EMPLOYMENT		
	YOU	SPOUSE
Pay period: weekly, every other week, twice per month, monthly		
Net income pay period (take home pay - amount of paycheck or deposit)		

OTHER MONTHLY INCOME		
	YOU	SPOUSE
Income from business, profession or farm		
Income from real property (rent, mineral rights, royalties, other		
Interest and dividends		
Pension or retirement income		
Social Security		
Alimony and/or child support		
Other (describe)		

Do you expect your income to change in the next 12 months? YES NO

Do you expect other income? Commissions Bonus Tax Refunds? YES NO
 How much? _____

Do you normally receive a tax refund? _____ How much? _____

IF YOU FILE A CHAPTER 13 AND RECEIVE A REFUND MORE THAN \$2000, THE CHAPTER 13 TRUSTEE WILL TAKE IT AND PAY IT TO CREDITORS THAT MAY NOT OTHERWISE BE GETTING PAID IN YOUR PLAN

MONTHLY EXPENSES

Mortgage/rent/ lot rent	\$
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Tax included? YES NO Insurance? YES NO

Mortgage/rent/ lot rent - for second lien or home (circle)	\$
Mortgage/rent/ lot rent - for second lien or home (circle)	\$
Electricity	\$
Natural gas or propane	\$
Water and sewer	\$
Telephone	\$
Cell phone	\$
Cable	\$
Internet service provider	\$
COMMUNICATION PKG (phone)(cable)(cell) circle	\$
Other utilities (describe)	\$
Home maintenance (incl yard and appliance repair)	\$
Food	\$
Household goods and supplies	\$
Clothing	\$
Laundry and Dry Cleaning	\$
Average monthly out of pocket PRESCRIPTIONS	\$
Average monthly out of pocket DOCTOR	\$
Average monthly out of pocket DENTAL	\$
Gasoline, oil, maintenance and repairs	\$
Recreation and entertainment	\$
Charitable contributions	\$
Personal care and grooming (hair, nails, etc.)	\$
Home owners insurance if not in mortgage	\$
Life insurance	\$
Health insurance (if paid separately not by wage deduction)	\$
Auto insurance	\$
Taxes (if not included in mortgage or by payroll deduction)	\$
Child care	\$
Rent to own payments?	\$
Storage?	\$
Security?	\$
Health or fitness club	\$

FOR CARS AND TRUCKS

MAKE	MODLE	YEAR	APPROX MILEAGE	PAYMENT
				\$
				\$
				\$

MONTHLY CHILD SUPPORT	\$
FOOD NOT INCLUDED IN GROCERIES	\$
SCHOOL ACTIVITIES FOR CHILDREN	\$
LUNCH MONEY IF NOT INCLUDED IN FOOD	\$
Other expense (describe)	\$
Other expense (describe)	\$
Other expense (describe)	\$
Other expense (describe)	\$