



## BANKRUPTCY INTAKE FORM

Name: \_\_\_\_\_

Date: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Are you currently employed? Y N      Six months average income: \$ \_\_\_\_\_

Are you a W2 Employee, 1099, or Self-Employed? \_\_\_\_\_

Phone number where we can leave a confidential message: \_\_\_\_\_

Email address: \_\_\_\_\_

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

Emergency Name and phone number contact: \_\_\_\_\_

How were you referred to our office: \_\_\_\_\_

Spouse: (even if not included in bankruptcy): \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Is your spouse employed? Y N      Six months average income: \$ \_\_\_\_\_

Are you a W2 Employee, 1099, or Self-Employed? \_\_\_\_\_

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Have you ever filed bankruptcy? Y N      If yes, what year? \_\_\_\_\_ Chapter: 7 13

Has your spouse ever filed bankruptcy? Y N      If yes, what year? \_\_\_\_\_ Chapter: 7 13  
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Are you facing foreclosure? Y N      Past due and owing to Mortgage Co? \$ \_\_\_\_\_

Are you facing vehicle repossession? Y N      If yes, how much do you owe? \$ \_\_\_\_\_

Have any of your creditors filed a lawsuit against you? Y N

Do you have any judgments or garnishments against you? Y N      For?: \_\_\_\_\_

Have you used credit cards in the past 90 days? Y N      For?: \_\_\_\_\_

How much do you owe on your credit cards? \$ \_\_\_\_\_ Spouse: \$ \_\_\_\_\_

Do you have any equity in your house? Y N      If yes, how much? \$ \_\_\_\_\_

Do you owe any federal and/or state taxes? Y N If yes, how much? \$\_\_\_\_\_

Have you liquidated retirement accounts? Y N When? \_\_\_\_\_ How much? \$\_\_\_\_\_

Do you owe any federal or private student loans? Y N If yes, how much? \$\_\_\_\_\_

Are you currently involved in or received a personal injury settlement? Y N When? \_\_\_\_\_

How much money did you receive? \$\_\_\_\_\_

If the case is pending, what does your attorney think it is worth? \$\_\_\_\_\_

Have you received any income in the past 3 years other than from your employment? (e.g. child support, Social Security, unemployment, etc.) \$\_\_\_\_\_

Have you tried credit counseling? Y N Have you taken the credit-counseling course? Y N

If you owe back child support, how much do you owe? \$\_\_\_\_\_

How much back alimony or attorney's fees do you owe? \$\_\_\_\_\_

How much State and Federal taxes do you owe? \$\_\_\_\_\_

How much past due HOA dues do you owe? \$\_\_\_\_\_

Do you have any information you would like to share with us?

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Attorney's Notes

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Retainer Quoted: \$\_\_\_\_\_