



HELPING GOOD PEOPLE THROUGH HARD TIMES

CLIENT INTAKE SHEET				DATE: _____		
NAME _____	(First)	(MI)	(Last)	(Jr/Sr.)	DOB: _____	(Date of Birth)
SOCIAL SECURITY NUMBER _____				TDL# _____	(Texas Driver's License #)	
MAILING ADDRESS _____						
CITY _____	STATE _____		ZIP CODE _____			
PHYSICAL ADDRESS _____						
CITY _____	STATE _____		ZIP CODE _____			
PHONE _____				CELL PHONE _____		
WORK PHONE _____				EMAIL _____		
MARITAL STATUS <input type="checkbox"/> SINGLE <input type="checkbox"/> MARRIED <input type="checkbox"/> SEPARATED <input type="checkbox"/> DIVORCED						
SPOUSE _____					DOB: _____	
(even if they are not filing) (First) (MI) (Last) (Jr/Sr.)						
SOCIAL SECURITY NUMBER _____				TDL# _____		
PHONE _____				CELL PHONE _____		
WORK PHONE _____				EMAIL _____		
DO YOU HAVE CHILDREN OR OTHER DEPENDENTS WHO LIVE WITH YOU? _____						
IF YES, PLEASE LIST NAME, AGE AND RELATION _____						
HOW LONG HAVE YOU LIVED IN TEXAS? _____						

HOW DID YOU HEAR ABOUT US? (check all that apply)	
CLIENT REFERRAL <input type="checkbox"/>	NAME _____
ATTORNEY REFERRAL <input type="checkbox"/>	NAME _____
CPA REFERRAL <input type="checkbox"/>	NAME _____
INTERNET <input type="checkbox"/>	SEARCH ENGINE _____
YELLOW PAGES <input type="checkbox"/>	
OTHER <input type="checkbox"/>	LIST _____

IS YOUR HOUSE IN DANGER OF FORECLOSURE? _____	IF YES, DATE SET? _____
IS YOUR CAR IN DANGER OF REPOSSESSION? _____	MONTHS BEHIND? _____
DO YOU OWE CHILD SUPPORT? _____	ARE YOU FACING ANY LAWSUITS? _____
HAVE YOU FILED BANKRUPTCY BEFORE? _____	WHEN? _____
WHERE DO YOU BANK? _____	DO YOU OWE YOUR BANK MONEY? _____
HAVE YOU FILED ALL OF YOUR IRS TAX RETURNS? _____	
DO YOU OWE THE IRS? _____	WHICH YEARS? _____

DO YOU OWN A HOUSE? _____ DO YOU OWE PROPERTY TAXES? _____

NAME OF MORTGAGE CO AND TOTAL AMOUNT OWED _____

NAME OF SECOND MORTGAGE CO AND TOTAL OWED _____

MONTHLY MORTGAGE PAYMENT _____ AMOUNT BEHIND _____

MONTHLY 2ND MORTGAGE PYMT _____ AMOUNT BEHIND _____

VALUE OF HOUSE _____ DO YOU OWE HOA DUES? _____

DO YOU OWN ANY OTHER PROPERTY? _____

FOR EACH VEHICLE YOU OWN, HAVE CO-SIGNED FOR, OR HAVE IN YOUR NAME (even if you do not owe money on it) PLEASE LIST: (Include cars, trucks, boats, ATVS, jet skis, etc.)

CREDITOR	YEAR	MAKE	MODEL	MONTHLY PAYMENT	TOTAL OWED	AMOUNT BEHIND
<i>e.g. Capital One</i>	<i>2010</i>	<i>Chevy</i>	<i>Silverado</i>	<i>\$400.00</i>	<i>\$10,000.00</i>	<i>\$800.00</i>

APPROXIMATELY HOW MANY CREDITORS DO YOU HAVE? _____

WOULD YOU LIKE US TO PULL YOUR CREDIT REPORT TODAY? _____

(You do not have to do this, but it will be helpful in analyzing your situation. All three credit bureaus will be pulled and we only charge you what we are charged: \$33.00 for single; \$53.00 for joint)

APPROXIMATELY HOW MUCH DO YOU OWE IN CREDIT CARD DEBT? _____

APPROXIMATELY HOW MUCH DO YOU OWE IN STUDENT LOAN DEBT? _____

APPROXIMATELY HOW MUCH DO YOU OWE IN MEDICAL DEBT? _____

APPROXIMATELY HOW MUCH DO YOU OWE IN PAYDAY LOANS? _____

DO YOU HAVE ANY OTHER UNSECURED DEBT? _____

DO YOU OWE A CREDIT UNION? _____

HAVE YOU CHARGED ANYTHING IN THE LAST 90 DAYS? _____

HAVE YOU HAD ANY CASH ADVANCES OR BALANCE TRANSFERS? _____

FOR EACH CREDITOR FOR FURNITURE, APPLIANCES OR JEWELRY, PLEASE LIST:

CREDITOR	COLLATERAL	DATE BOUGHT	AMOUNT OWED	VALUE
<i>e.g. conns</i>	<i>Washer/dryer</i>	<i>1/1/11</i>	<i>\$500.00</i>	<i>\$300.00</i>

DO YOU HAVE A 401K? _____ VALUE _____ DO YOU HAVE A LOAN ON IT? _____
 DO YOU HAVE ANY LIFE INSURANCE POLICIES? _____ CASH VALUE? _____
 DO YOU HAVE ANY IRAS? _____ WAS THE IRA INHERITED? _____
 DO YOU HAVE ANY CLAIMS AGAINST ANYONE? _____ IF SO, WHOM? _____

EMPLOYER _____	SPOUSE'S EMPLOYER _____
APPROXIMATE MONTHLY GROSS INCOME (before taxes, insurance, 401k) _____	APPROXIMATE MONTHLY GROSS INCOME (before taxes, insurance, 401k) _____
APPROXIMATE MONTHLY NET INCOME (take home pay) _____	APPROXIMATE MONTHLY NET INCOME (take home pay) _____
DO YOU HAVE OTHER INCOME? (circle all that apply) Social Security / Pension / Child Support / Family Assistance / Second Job / Self-employment	DOES YOUR SPOUSE HAVE OTHER INCOME? (circle all that apply) Social Security / Pension / Child Support / Family Assistance / Second Job / Self-employment
APPROXIMATE MONTHLY AMOUNT FROM OTHER INCOME _____	APPROXIMATE MONTHLY AMOUNT FROM OTHER INCOME _____

 PROSPECTIVE CLIENT

 PROSPECTIVE CLIENT

ATTORNEY NOTES

CHAPTER _____ FEE QUOTED _____ FIXED / HOURLY
 FILING: INDIVIDUAL/JOINT FILING: BUSINESS/NON-BUSINESS