

CLIENT WORKSHEET

DATE: _____

NAME : _____ Married? _____

SPOUSE'S NAME (only if she/he needs to file bankruptcy) _____

HAVE YOU FILED FOR BANKRUPTCY RELIEF? _____ What year? _____

IN ORDER FOR US TO GIVE YOU ADVICE AS TO WHETHER OR NOT YOU QUALIFY TO FILE CHAPTER 7 OR 13, WE NEED YOU TO COMPLETE THE FOLLOWING QUESTIONNAIRE.

YOUR ASSETS

1. DO YOU OWN REAL ESTATE? YES/NO _____

IF no, Have you EVER owned any real estate? _____
When was it transferred? _____

IF yes, How much is it worth? _____

How much do you owe on the first mortgage? _____

Name of Creditor _____

What is your monthly payment? _____

Are you current on your payments? _____

If behind, how many months do you owe? _____

How much do you owe on the second mortgage? _____

Name of Creditor _____

What is your monthly payment? _____

Are you current on your second mortgage payments? _____

Do you have a third mortgage or any other liens on your property, including a home equity line? _____

If so, please list the creditor and the amount owed. _____

Do you owe property taxes? _____ How much? _____

2. DO YOU HAVE A CAR IN YOUR NAME? YES/NO _____

IF YES, What kind of car is it? _____ How much is it worth? _____

How much do you owe on it? _____ Name of Creditor _____

What is your monthly payment? _____ Are you current on your payments? _____

When was it purchased? _____ When was it last financed? _____

3. DO YOU HAVE A SECOND CAR IN YOUR NAME? YES/NO _____

IF YES, What kind of car is it? _____ How much is it worth? _____

How much do you owe on it? _____ Name of Creditor _____

What is your monthly payment? _____ Are you current on your payments? _____

When was it purchased? _____ When was it last financed? _____

4. DO YOU HAVE A THIRD CAR IN YOUR NAME? YES/NO _____

IF YES, What kind of car is it? _____ How much is it worth? _____

How much do you owe on it? _____ Name of Creditor _____

What is your monthly payment? _____ Are you current on your payments? _____

When was it purchased? _____ When was it last financed? _____

5. DO YOU HAVE ANY OTHER VEHICLES IN YOUR NAME?

IF YES, Please list below.

6. DO YOU HAVE ANY OTHER ASSETS THAT HAVE A VALUE OF OVER \$1,000 INCLUDING ANY BUSINESSES? YES/NO? _____

FOR EXAMPLE, DO YOU HAVE ANY OF THE FOLLOWING? yes or no

1) Boats? _____

2) Lawsuits or claims against anyone to collect money? _____

3) Potential Tax Refunds for 2006? _____

4) Retirement accounts? _____

5) Other? _____

YOUR DEBTS

ASIDE FROM HOME MORTGAGES AND CAR LOANS, DO YOU OWE ANY OF THE FOLLOWING? IF YES, STATE THE APPROXIMATE AMOUNT OWED. IF YOU DO NOT KNOW FOR SURE, JUST ESTIMATE THE AMOUNT OWED.

1) WHAT IS THE APPROXIMATE AMOUNT OF YOUR CREDIT CARDS DEBT?

_____ How many cards? _____

2) DO YOU HAVE ANY PERSONAL BANK LOANS? _____

IF YES, AMOUNT OWED? _____

3) DO YOU OWE ANY LOCAL FINANCE COMPANIES? _____

IF YES, AMOUNT OWED? _____

4) DO YOU HAVE ANY LOCAL CASH ADVANCES? _____

IF YES, AMOUNT OWED? _____

5) DO YOU HAVE ANY FAMILY LOANS? _____

IF YES, AMOUNT OWED? _____

6) DO YOU HAVE ANY MEDICAL BILLS? _____

IF YES, TOTAL AMOUNT OWED? _____

7) DO YOU HAVE ANY CAR LOAN DEFICIENCIES? _____

IF YES, HOW MUCH IS OWED? _____

8) DO YOU OWE THE IRS OR STATE? _____

IF YES, TO WHOM AND FOR HOW MUCH? _____

9) STUDENT LOANS? _____

IF YES, TO WHOM AND FOR HOW MUCH? _____

10) BUSINESS LOANS? _____

