INTAKE WORKSHEET If a question does not apply to you, please mark it "N/A"

*Please note:

- 1. Submission of the completed Intake Worksheet does not constitute an agreement to provide legal services, nor does it create an attorney-client relationship between you and our firm. We do not consider ourselves retained as your lawyers until we have: 1) met with you; and 2) signed an Engagement Agreement.
- 2. Providing accurate information on this Intake Worksheet is critical, as any advice we may give you during the consultation will be based on this information.

Date:	NO	FE : please enter some	thing in each box - if som	nething doesn't apply to yo	u, enter N/
Name:	me:		Spouse:		
Address:			Address:		
Cell phone #:			Cell phone #:		
Is it OK to tex	t you? Yes	No	Is it OK to text you?	Yes No	
Home phone #:			Home Phone #:		
Email:			Email:		
Email secure (can we use this email address in			Email secure?		
complete priv	acy)? Yes	No		Yes No	
How did you	find our firm?		Referred By:		
LIQUID ASSE	TS				
1. Checking ac	ccount balance: \$		(approximate tota	al today; we know it flu	uctuates)
2. Savings acc	count balance: \$		(approximate tota	al today; we know it flu	uctuates)
3. Retirement	accounts total: \$		(approximate tota	al today; we know it flu	uctuates)
REAL ESTAT	E (real estate is dirt; li	ke a house, or a bu	ilding, or a piece of I	and)	
Property Addre	ess		Estimated value (Zill	ow.com or a rough estin	nate)
Debts	Lender Name	Total balance due	Monthly Payment	# of payments behin	d
1 st Mortgage		\$	\$		
		\$	\$		
2 nd Mortgage			1	i	
2 nd Mortgage 3 rd Mortgage		\$	\$		

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*Additional Properties (same questions apply; please use another sheet if you have more than one property)

MOTOR VEHICLES AND RECREATIONAL VEHICLES

Vehicle #1

Description (Year, Make, and Model) \$ Kelley Blue Book Value Creditor name (See www.kbb.com) # of payments behind Loan Date Current desire for this vehicle: keep Vehicle #2 Description (Year, Make, and Model) Kelley Blue Book Value Creditor name (See www.kbb.com) Monthly payment # of payments behind Loan Date Current desire for this vehicle: keep surrender *Additional Vehicles (same questions apply; It is particularly important that we know how many cars you have, and how much equity you have in each car. If your child's car is still in your name, or you are on your parent's vehicle for estate planning purposes, be sure to list that car here so we can discuss it.) ADDITIONAL DEBT ESTIMATES (note that you must list_all of your debts on your final bankrupt cy Schedules: it is a serious crime to intentionally fail to do so! What you are filling out here are not your Sc hedules, but this information is intended to give us an idea of whether we can help you): 1. Tax Debt: \$ _____ (these probably won't be discharged, but you must list them anyway!) 2. Student Loans: \$ _____ (these will not be discharged, but you must list them anyway!) 3. Child support or alimony: \$ _____ (these also won't be discharged, but must be listed!) 4. Unsecured: \$ (such as credit card debt, medical bills, and personal loans) a. Approximately how many unsecured creditors do you have? b. Approximately how much do you pay per month to unsecured creditors? \$ 5. Other Debts: \$ _____ (any and all debts must be listed!) LITIGATION No Case No. of lawsuit: Are you currently involved in any lawsuits? Yes Name of creditor(s) involved: _____ Date served _____ Has a judgment been entered against you? Yes: No Are you being garnished? Yes No **INCOME** 1. Your annual gross income from employer: \$ (gross; that's before any deductions) Name of Employer(s): 2. Spouse's annual gross income from employer: \$ (gross; that's before any deductions) Name of Employer(s):

s. Income from operation of a business: Monthly Average: \$Total in last 6 mos.: \$				
4. Income from social security (including SSDI): Monthly: \$				
5. Income from pension: Monthly: \$				
6. Income from unemployment: Monthly: \$				
7. Number of People Living in Your Home (including you): If the other household members a contributing to expenses, approximately how much (per month)? \$				
DO YOU OWN A BUSINESS? IF YES, PLEASE ANSWER ALL QUESTIONS BELOW:				
Business Name: Corporation LLC Partnership DBA/Sole Proprietorship				
Current Desire: keep close If recently closed, on what date:				
Please submit the following documents along with this Intake Worksheet for <u>each</u> business you own:				
Balance Sheet;				
2. Profit & Loss Statement; and				
Accounts Payable list with creditor names & amounts due to each.				
GENERAL CONSIDERATIONS:				
1. Have you used any of your credit cards in last 90 days? Yes No If yes, how much (total)? \$				
2. Have you taken any cash advances from credit card(s) in the last 7 months ? Yes No				
If yes, how much (total)? \$				
3. Have you made any payments to relatives within the last one year? Yes No				
Amount of payment(s): \$ Date(s) of payment(s): Relationship:				
Amount of payment(s): \$ Date(s) of payment(s):Relationship:				
4. Have you ever filed bankruptcy before? Yes No				
If yes, when? What chapter? Where?				
5. Are you married? Yes No If yes, please enter the date of your marriage:				
6. Have you been divorced in the past two years? Yes No If yes, please provide a copy of your Divorce Decree (and Property Settlement Agreement, if separate) with this Intake Worksheet.				
7. Have you lived in Arizona for a FULL two years? Yes No				
If not, what date did you move to Arizona: From what state:				
<u>LAST QUESTIONS</u>				
Is there anything special/extraordinary/unusual we should know before we decide if we can help you?				
What do you wish to achieve for yourself and your family?				