

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: _____ **NOTE:** please enter something in each box - if something doesn't apply to you, please enter N/A.

Name:	Spouse:
Address:	Address:
Cell phone #:	Cell phone #:
Is it OK to text 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 complete privacy)? Yes No	Email secure? Yes No
How did you find our firm?	Referred By:

LIQUID ASSETS

1. Checking account balance: \$ _____ (approximate total today; we know it fluctuates)

2. Savings account balance: \$ _____ (approximate total today; we know it fluctuates)

3. Retirement accounts total: \$ _____ (approximate total today; we know it fluctuates)

REAL ESTATE (real estate is dirt; like a house, or a building, or a piece of land)

Property Address _____ \$ _____
Estimated value (Zillow.com or a rough estimate)

Debts	Lender Name	Total balance due	Monthly Payment	# of payments behind
1 st Mortgage		\$	\$	
2 nd Mortgage		\$	\$	
3 rd Mortgage		\$	\$	
HOA		\$	\$	

Date purchased: _____ Foreclosure date (if any): _____ Current desire: keep surrender

***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 _____
(See www.kbb.com) Creditor name

\$ _____ \$ _____ _____ _____
Total balance due Monthly payment # of payments behind Loan Date

Current desire for this vehicle: keep surrender

Vehicle #2

Description (Year, Make, and Model) \$ _____ Kelley Blue Book Value _____
(See www.kbb.com) Creditor name

\$ _____ \$ _____ _____ _____
Total balance due 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 bankruptcy Schedules: it is a serious crime to intentionally fail to do so! What you are filling out here are not your Schedules, 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 (including business guarantees): \$ _____ (any and all debts must be listed!)

LITIGATION

Are you currently involved in any lawsuits? Yes No Case No. of lawsuit: _____

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): _____

3. 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 are 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 each business you own:

1. Balance Sheet;
2. Profit & Loss Statement; and
3. Accounts Payable list with creditor names & amounts due to each.

GENERAL CONSIDERATIONS:

1. How many bank accounts do you have (incl. CashApp, PayPal, Venmo, betting apps, etc.) _____
2. Have you used any credit cards in last 90 days? Yes No If yes, how much (total)? \$ _____
3. Have you taken any cash advances from credit card(s) in the last **7 months**? Yes No
If yes, how much (total)? \$ _____
4. Have you made any payments to relatives within the last one year? Yes No
Amount of payment(s): \$ _____ Date(s) of payment(s): _____ Relationship: _____
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5. Have you ever filed bankruptcy before? Yes No
If yes, when? _____ What chapter? _____ Where? _____
6. Are you married? Yes No If yes, please enter the date of your marriage: _____
7. 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.
8. Have you lived in Arizona for a FULL two years? Yes No
If not, what date did you move to Arizona: _____ From what state: _____

LAST QUESTIONS

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?

