

## **BANKRUPTCY INTAKE SHEET-QUICK & EASY VERSION**

- 1. Name** \_\_\_\_\_
- 2. Phone- cell** \_\_\_\_\_, **work** \_\_\_\_\_, **home** \_\_\_\_\_
- 3. Address** \_\_\_\_\_
- 4. Email** \_\_\_\_\_
- 5. How where you referred** \_\_\_\_\_

### **QUESTIONS: 20 quick and easy questions:**

- 1. Employer** \_\_\_\_\_
- 2. Income: Yearly** \_\_\_\_\_, **Monthly gross** \_\_\_\_\_ **& Net** \_\_\_\_\_
- 3. REAL ESTATE** \_\_\_\_\_ **own** \_\_\_\_\_ **Value** \_\_\_\_\_ **Equity** \_\_\_\_\_
- 4. VEHICLES** \_\_\_\_\_ (how many) \_\_\_\_\_ **lien/loans** \_\_\_\_\_
- 5. HAVE YOU EVER FILED BK BEFORE** \_\_\_\_\_
- 6. IS YOUR SPOUSE FILING** \_\_\_\_\_
- 7. MARITAL STATUS** \_\_\_\_\_, **# of Dependents** \_\_\_\_\_
- 8. ARE YOU BEING SUED/GARNISHED** \_\_\_\_\_
- 9. WHAT COURT WHERE AND WHEN** \_\_\_\_\_
- 10. WHAT KINDS OF DEBTS** \_\_\_\_\_
- 11. TOTAL AMOUNT OF DEBT ( gen. estimate)** \_\_\_\_\_
- 12. DO YOU PAY SUPPORT TO OTHER PARTY** \_\_\_\_\_
- 13. DID YOU FILE LATEST TAX RET.** \_\_\_\_\_
- 14. ANY LARGE RECENT PURCHASES** \_\_\_\_\_
- 15. ANY RECENT BALANCE TRANSFERS** \_\_\_\_\_
- 16. ASSETS OTHER THAN HOUSEHOLD GOODS** \_\_\_\_\_
- 17. ANY RECENT TITLE TRANSFERS ( 3yrs)** \_\_\_\_\_
- 18. DOES ANYONE OWE YOU MONEY** \_\_\_\_\_
- 19. SETTLEMENT COMING** \_\_\_\_\_ **ACCIDENT** \_\_\_\_\_ **INHERITANCE** \_\_\_\_\_
- 20. DO YOU WANT TO KEEP YOUR VEHICLES** \_\_\_\_\_

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