

**INITIAL MEETING QUESTIONNAIRE**

**PERSONAL:**

NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #s: HOME: \_\_\_\_\_ MOBILE: \_\_\_\_\_ WORK: \_\_\_\_\_

SPOUSE'S NAME: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

PHONE #s: HOME: \_\_\_\_\_ MOBILE: \_\_\_\_\_ WORK: \_\_\_\_\_

DEPENDENTS: \_\_\_\_\_ HAVE YOU EVER FILED BANKRUPTCY? YES \_\_\_\_\_ NO \_\_\_\_\_  
-IF YES, WHERE \_\_\_\_\_ WHEN \_\_\_\_\_

HAVE YOU OR YOUR SPOUSE USED ANY OTHER NAMES IN THE PAST 8 YEARS?  
IF YES: LIST ALL OTHER NAMES: \_\_\_\_\_

HOW LONG LIVED IN NEVADA? \_\_\_\_\_

**RESIDENCE:**

OWN OR RENT? \_\_\_\_\_ MONTHLY PAYMENT: \_\_\_\_\_

IF OWN: CURRENT VALUE: \_\_\_\_\_ PURCHASE PRICE: \_\_\_\_\_  
BALANCE OF MORTGAGE(S): \_\_\_\_\_  
ARE YOU CURRENT? \_\_\_\_\_ IF NO, HOW MANY MONTHS ARE YOU BEHIND? \_\_\_\_\_  
DO YOU WANT TO KEEP YOUR HOME? \_\_\_\_\_

DO YOU OWN OTHER PROPERTIES? \_\_\_\_\_ HOW MANY? \_\_\_\_\_

1. ADDRESS: \_\_\_\_\_  
CURRENT VALUE: \_\_\_\_\_ PURCHASE PRICE: \_\_\_\_\_  
BALANCE OF MORTGAGE(S): \_\_\_\_\_  
ARE YOU CURRENT? \_\_\_\_\_ IF NO, HOW MANY MONTHS ARE YOU BEHIND? \_\_\_\_\_

2. ADDRESS: \_\_\_\_\_  
CURRENT VALUE: \_\_\_\_\_ PURCHASE PRICE: \_\_\_\_\_  
BALANCE OF MORTGAGE(S): \_\_\_\_\_  
ARE YOU CURRENT? \_\_\_\_\_ IF NO, HOW MANY MONTHS ARE YOU BEHIND? \_\_\_\_\_

**DEBTS:**

	MONTHLY PAYMENT	TOTAL BALANCE OWED
CHILD SUPPORT	_____	_____
ALIMONY	_____	_____
TAXES	_____	_____
STUDENT LOANS	_____	_____
CREDIT CARDS	_____	_____
MEDICAL BILLS	_____	_____
PAYDAY/PERSONAL LOANS	_____	_____

DO YOU HAVE ANY PENDING LAWSUITS: YES \_\_\_\_\_ NO \_\_\_\_\_

HAVE YOU USED YOUR CREDIT WITHIN THE LAST 90 DAYS? \_\_\_\_\_  
IF YES: HOW MUCH CHARGE: \$ \_\_\_\_\_  
CASH ADVANCES: \$ \_\_\_\_\_

**ASSETS:** (CURRENT BALANCE OR FMV)

BANK ACCOUNTS \_\_\_\_\_  
 CASH \_\_\_\_\_  
 IRA/PENSION/401K \_\_\_\_\_  
 RVs/BOATS/JET SKIS/... \_\_\_\_\_  
 VEHICLE 1: YEAR \_\_\_\_\_ MAKE \_\_\_\_\_ MODEL \_\_\_\_\_ VALUE \_\_\_\_\_ OWED: \_\_\_\_\_  
 VEHICLE 2: YEAR \_\_\_\_\_ MAKE \_\_\_\_\_ MODEL \_\_\_\_\_ VALUE \_\_\_\_\_ OWED: \_\_\_\_\_  
 VEHICLE 3: YEAR \_\_\_\_\_ MAKE \_\_\_\_\_ MODEL \_\_\_\_\_ VALUE \_\_\_\_\_ OWED: \_\_\_\_\_  
 OTHER: \_\_\_\_\_

HAVE YOU TRANSFERRED, SOLD OR GIVEN AWAY ANY ASSETS IN THE PAST 24 MONTHS? DESCRIBE \_\_\_\_\_

**INCOME:**

YOUR MONTHLY GROSS INCOME: \_\_\_\_\_  
 SOURCE: \_\_\_\_\_  
 SUBJECT TO ANY GARNISHMENTS? \_\_\_\_\_

SPOUSE MONTHLY GROSS INCOME: \_\_\_\_\_  
 SOURCE: \_\_\_\_\_  
 SUBJECT TO ANY GARNISHMENTS? \_\_\_\_\_

**MONTHLY EXPENSES:**

HOUSING \_\_\_\_\_  
 UTILITIES \_\_\_\_\_  
 CAR PAYMENTS \_\_\_\_\_  
 INSURANCE \_\_\_\_\_  
 FOOD \_\_\_\_\_  
 ALIMONY \_\_\_\_\_  
 CHILD SUPPORT \_\_\_\_\_

PLEASE SIGN ON THE DATE OF THE INITIAL MEETING TO CONFIRM THAT YOU RECEIVED THE DISCLOSURES, NOTICE TO INDIVIDUAL CONSUMER DEBTOR(S) UNDER SECTION 342(B) AND 527(A) OF THE BANKRUPTCY CODE AND IMPORTANT INFORMATION ABOUT BANKRUPTCY ASSISTANCE SERVICES FROM AN ATTORNEY OR BANKRUPTCY PETITION PREPARER.

DATE: \_\_\_\_\_ PRINT NAME: \_\_\_\_\_

PRINT NAME: \_\_\_\_\_



**OFFICE USE ONLY**

DATE OF MEETING: \_\_\_\_\_ RECEIVED DISCLOSURES

HOW DID THEY HEAR ABOUT THE FIRM? \_\_\_\_\_

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

DATE RETAINED: \_\_\_\_\_ CHAPTER 7 OR 13 : \_\_\_\_\_