

Initial Meeting Questionnaire

Contact Information:

Name: _____

Address: _____ City: _____ State: ____ Zip: _____

Phone #: Home: _____ Mobile: _____ Work: _____

Email Address: _____

Spouse Name: _____

Address: _____ City: _____ State: ____ Zip: _____

Phone #: Home: _____ Mobile: _____ Work: _____

Email Address: _____

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 names used: _____

How long have you 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? _____

Additional Properties:

Address 1: _____

Current Value: _____ Purchase Price: _____ Balance of Mortgage(s): _____

Are you current? _____ If No, How many months are you behind? _____

Address 2: _____

Current Value: _____ Purchase Price: _____ Balance of Mortgage(s): _____

Are you current? _____ If No, How many months are you behind? _____

Do you own or purchase any land? _____ If Yes, Describe: _____

Do you have any Time Shares? _____ If Yes, Describe: _____

Monthly Income:

Monthly Expense:

Income Source	Self	Spouse
Employment	\$	\$
Rental Income	\$	\$
Social Security Income	\$	\$
Retirement	\$	\$
Unemployment	\$	\$
Family	\$	\$
Tips	\$	\$
Commissions	\$	\$
Other	\$	\$

Housing	\$
Utilities	\$
Car Payments	\$
Insurance	\$
Food	\$

How often are you Paid? _____

How often is your spouse Paid? _____

Debt:

Debt Type	Monthly Payment	Total Balance
Child Support		
Alimony		
Taxes		
Student Loan		
Credit Card		
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 Fair Market Value)

Bank Account: _____

Cash: _____

IRA/Pension/401K _____

RVs/Boats/Jet Skis/.. _____

Vehicle 1: Year _____ Make _____ Model _____ Value _____

Amount Owed _____ Creditor _____

Vehicle 2: Year _____ Make _____ Model _____ Value _____

Amount Owed _____ Creditor _____

Vehicle 3: Year _____ Make _____ Model _____ Value _____

Amount Owed _____ Creditor _____

Other: _____

Have you transferred, sold, or given away any assets in the past 24 months? Describe: _____

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 an Important Information about Bankruptcy Assistant Services from an Attorney or Bankruptcy Petition Preparer.*

_____ Date: _____ Signed _____ Date: _____

Signed _____ Signed _____

Office Use Only

Date of Meeting: _____ Received Disclosures: Referral Source: _____

Comments/Quotes: _____

