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PLEASE FILL OUT WITH BEST ESTIMATES USE AS MUCH SPACE AS NEEDED

PLEASE FILL OUT ON COMPUTER AND EMAIL BACK TO ME

Consult: \$150 waived with return of this form prior to meeting

Name and Address:

Email

Phone

- Support Obligation (Alimony / child support)?

- Income Taxes owed or refunds due you Provide year and amount owed or refund due

- Student Loans?

- Parking Tickets, Moving Violations or other Government fines or penalties?
Give type and amount

Residence: Indicate: / __House __ Condo __Coop / ____ Rent

Who is on the Deed or lease:

If owned, Current Value (A sales price)

(NOTE: A Home Equity Loan is a mortgage)

1st Mortgage Bank
Balance
Monthly payment:
Months behind

2d Mortgage same info

Describe any other real estate (includes land, timeshare, vacation shares)

Vehicles (Cars, Trucks, Vans, Cycles, ATV's) and loans:

List each car, EVEN if no loan

1. Year, Make, Model
If bought used, when
Value
Bal of Loa
Monthly:
Months behind

Other cars

Other Debt:

I. Credit Cards

How Many (include closed or written off):

Grand Total of Balances:\$_____

Estimate Amount charged in last **3** months: \$_____

How Much of credit card balances are for business related charges or expenses

II. Other debt (Medical; Loans(Bank family, friends); Past Due utilities; all other

III List lawsuits by you or against you: List who is suing who; What for and Amount

Assets / Belongings: If have any of the following, please specify and its tag sale value

Guns, stocks, bonds, CD's Funds

Claims for money owed to client

Pensions, IRA's, Keoughs

College Savings Plans (where and amount)

Bank Accounts(type, (where and amount)

Cause of Financial Problem:

of People in Household:

Occupation

How Long at current job: