

CLIENT INTERVIEW DATE: _____ HOW DID YOU LOCATE THIS OFFICE: _____

TELEPHONE: HM _____ CELL _____ CELL _____ WORK _____

NAME: _____ SINGLE / DIVORCED / MARRIED - SPOUSE NAME: _____

ADDRESS: _____

CHILDREN NAMES AND AGES: _____

DO YOU RENT: Y / N IF YES, MONTHLY RENT PAYMENT: \$ _____

DO YOU OWN: Y / N DATE OF PURCHASE: _____ PURCHASE PRICE: _____ VALUE: _____

1ST MORTGAGE COMPANY NAME _____ BALANCE \$ _____

MONTHLY PAYMENT: \$ _____ ARE TAXES & INSURANCE INCLUDED IN YOUR PAYMENT? Y / N

ARE YOU DELINQUENT? Y / N HOW MANY MONTHS? _____ HAVE YOU BEEN SERVED? Y / N SALE DATE? Y / N

2ND MORTGAGE COMPANY NAME _____ BALANCE \$ _____

MONTHLY PAYMENT: \$ _____ DELINQUENT? Y / N HOW MANY MONTHS? _____ BEEN SERVED? Y / N

SALE DATE? Y / N ANNUAL PROPERTY TAXES: _____ ANNUAL INSURANCE: _____

HOA PAYMENT: \$ _____ DELINQUENT? Y / N HOW MUCH DO YOU OWE: _____ HOW MANY MONTHS? _____

BEEN SERVED? Y / N SALE DATE? Y / N OTHER LIENS: _____

ALL VEHICLES YEAR-MAKE-MODEL/LOAN BALANCES-MONTHLY PAYMENT/MILEAGE:

CAR #1: _____

CAR #2: _____

OTHER VEHICLES: _____

LAST TAX YEAR FILED/REFUND OR AMOUNT OWED: _____

STUDENT LOAN DEBT TOTAL: _____ MEDICAL BILL DEBT TOTAL: _____

TOTAL CREDIT CARD DEBT & ANY OTHER UNSECURED DEBT ESTIMATED NUMBER OF CREDITORS: \$ _____

HOW MUCH HAVE YOU CHARGED IN THE LAST 90 DAYS: \$ _____ ALL YEAR: \$ _____ ON HOW MANY CARDS: _____

EMPLOYMENT/MONTHLY INCOME: INDIVIDUAL: _____

HUSBAND: _____ WIFE: _____

OTHER INCOME: _____ FAMILY SUPPORT: _____

LIST ALL CHECKING/SAVINGS ACCOUNTS/BALANCES: _____

LIST ALL IRA, 401K, STOCKS, BONDS, ANNUITY, MONEY MARKET ACCOUNTS: _____

LIST ALL ASSETS VALUED OVER \$1,000.00 OTHER THAN HOME OR CARS LISTED ABOVE: _____

LAWSUITS AS A PLAINTIFF OR DEFENDANT: _____

WHAT DO YOU WISH TO ACCOMPLISH WITH THIS VISIT? _____

HAVE YOU EVER FILED BANKRUPTCY BEFORE: Y / N IF YES, HOW LONG AGO: _____ HOW MANY TIMES: _____

PLEASE LIST AND NUMBER ALL OTHER REAL PROPERTY ON THE BACK: