

Initial Client Interview Sheet
PLEASE COMPLETE AND BRING THIS WITH YOU TO YOUR INITIAL MEETING

The following information is needed in order to properly evaluate your situation. As with all communication between you and the attorney, all the information supplied is strictly confidential. It is very important for you to supply all relevant information, as the attorney cannot properly advise you without a complete understanding of your situation.

Name: _____

Home Address: _____

E-mail: _____

Home Phone: _____ Cell Phone: _____

Spouse's Information

Name: _____

Home Address: _____

E-mail: _____

Home Phone: _____ Cell Phone: _____

How did you hear about our office? _____

- Never married Married, living together Married, living apart
 Living with a domestic partner Divorced Widowed

If divorced, when did it become final: _____

Number of dependent children: _____

Any other person dependent on you: _____

What is your age: _____ Age of your spouse _____

Have you ever filed for bankruptcy before? If yes, when? _____

Was it a Chapter 7 or Chapter 13

Was it Discharged (successful) or Dismissed (did not go through)

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The Law Office of Lauren Ross is a federally designated debt relief agency pursuant to Title 11 of the US Code and provides legal assistance to consumers seeking relief under the Bankruptcy Code

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List all real estate you own(ed), when it was acquired and its present value:

Location	Date Acquired	Value
		\$
		\$
		\$

If you owe any money on any of your vehicles, list the type of vehicle, date purchased or leased and the amount owe(d):

Year/Make/Model	Date purchased	Value	Amount owed
		\$	\$
		\$	\$
		\$	\$
		\$	\$

List all retirement accounts you have an interest in (IRA, 401k, Union, Government, Military, Profit Sharing):

Type of account	Current value
	\$
	\$
	\$

Do own or have any ownership interest, in any business including partnerships:

Type of business	Date started (closed)	Annual gross income
		\$
		\$

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Your Income

Occupation:	
How Often are you paid?	Weekly_____
	2x month_____
	Every 2 weeks_____
Please provide your income per pay period Gross:\$ _____ Net: \$_____	
Have you received income from any other source than your job last year (for instance, social security, child support, workers' compensation, etc.)? If yes, please provide the source and monthly amount here:\$_____	

Your Spouse's Income

Occupation:	
How Often are you paid?	Weekly_____
	2x month_____
	Every 2 weeks_____
Please provide your income per pay period Gross:\$ _____ Net: \$_____	
Have you received income from any other source than your job last year (for instance, social security, child support, workers' compensation, etc.)? If yes, please provide the source and monthly amount here:\$_____	

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Debts

	Total	
Credit Card(s)	\$	
Loan(s)	\$	
Medical	\$	
Student Loan(s)	\$	
TAXES		Year
IRS (federal) taxes	\$	
	\$	
	\$	
	\$	
	\$	
FTB (state) taxes	\$	
	\$	
	\$	
	\$	
	\$	

Have you co-signed on a loan for anyone else? NO YES

Have you taken any cash advances in the past three months? NO YES

Have you made any balance transfers on any credit card in the past three months?
 NO YES

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Have you received, or are you entitled to, any inheritance, property settlement agreement, or proceeds from a life insurance? NO YES

Are you suing any one or have the right to sue them? NO YES

Do you have any claims against any one or the right to sue any one? NO YES

Does anyone owe you money for any reason? NO YES

Do you have a life estate or the right to use anyone else's property? NO YES

Do own any stocks or bonds? NO YES

Have you set up a trust in the past ten years? NO YES

Do you receive any income from a trust or annuity? NO YES

Do you have income from royalties, gas or mineral rights, copyrights, licenses agreements or patents now or in the future? NO YES

Have you filed all tax returns for the past three years? NO YES

Do you have any tax refund due you at this time? NO YES

Do you own any money from a marital settlement or judgment of divorce? NO YES

Have you been ordered to pay child or spousal support? NO YES

Is any support past due? NO YES

Anything else you think the attorney should be made aware of?

Date: _____ Signature: _____

Date: _____ Spouse's Signature: _____