

Notes by Mr. Grainger:

Date: _____

Montgomery Prattville Troy Extend Stay Emergency Pay Direct AL Power 7 13 Judg. Proof

Debt Relief Intake Form

Name and Address

Name: _____
Last First Middle

Telephone Number Home: _____ Work: _____ Cell: _____

Email Address: _____ Soc. Security No. _____ Date of Birth: _____

Have you used any other names in the past six years? No Yes: _____

Street Address: _____ City: _____ State: _____ Zip: _____ County _____

Have you lived at this address for the past 6 months? No Yes

If you have a different mailing address, please list:

Mailing Address: _____ City: _____ State: _____ Zip: _____

Name and Address of Spouse

Name: _____
Last First Middle

Has your spouse used any other names in the past six years? No Yes: _____

Telephone Numbers: Home: _____ Work: _____ Cell _____

Email Address: _____ Soc. Security No. _____ Date of Birth: _____

Address (*if different from yours*): _____ City _____ State: _____ Zip: _____

Prior/Pending Bankruptcy Cases in last 8 years? Chapter 7 Chapter 13

What year was it over? _____ Who was your attorney? _____

How did you select our firm?

Telephone Book Internet TV Commercial Letter from Firm Billboard

Other _____ Referred by: _____

Miscellaneous Questions

1. Have you lived in Alabama the past 2 years?
 Yes No

2. Please list take-home pay and other income:
Main Job\$ _____ per _____
2nd Job/Business\$ _____ per _____
Spouse Job\$ _____ per _____
Spouse 2nd Job/Business. \$ _____ per _____
Child Support Income ...\$ _____ per _____
Disability Income\$ _____ per _____
Social Security\$ _____ per _____
Pensions/Retirement....\$ _____ per _____
Unemployment.....\$ _____ per _____
Other Total Income \$ _____ per _____
Food Stamps \$ _____ per _____

3. Any changes to your income in the next 12 months?
 Yes No

4. How many people live in your home?
Adults _____ Children _____ Parents _____

5. Are you signed on any debts with someone else, such as a car or a house?
 Yes No

6. Have you been a part-owner or officer of a business in the last 6 years? Yes No
Name of business: _____

7. Do you own or rent your home?
 Own/Paying Rent: \$ _____ per month Live with Relatives/Friend

8. If you are buying your home, how much is it worth?
\$ _____ Tax Value Recent Appraisal

1st Mortgage: Company Name: _____
Balance owed: \$ _____ Monthly Pmt. \$ _____
How much behind on 1st mortgage? _____

2nd Mortgage: Company Name: _____
Balance owed: \$ _____ Monthly Pmt. \$ _____
How much behind on 2nd mortgage? _____

9. Besides your home, do you own any other real estate interests (include interest in inherited property)?
 Yes No

If Yes, list the addresses of all other real property:

10. Have you sold or transferred any real estate in the last 4 years? Yes No

11. Have you sold or given property to family members or friends in the last year? Yes No

12. Do you have a vehicle or other property that belongs to a friend or family member? Yes No

13. Do you owe taxes? Yes No Estimate below.
2015 & Before IRS \$ _____ State \$ _____
2016 to Date IRS \$ _____ State \$ _____

Aware of any tax liens? Yes No

14. Still need to file tax returns for these years?
 2018 2017 2016 2015 2014

15. Gotten cash off of a credit card (*not a debit card*) in last 3 months?
 Yes No \$ _____

16. Have you received any lump-sum settlements in the last year such as from a lawsuit, insurance claim or other lump-sums? Yes No If so, from whom and how much? _____

17. Are you suing anyone, in a class action or have a reason to sue anyone (car wreck, workers comp, etc.)? Yes No
Name of Attorney helping you: _____

18. Have you or your employer received any court papers? Yes No

19. Are there any old lawsuits you owe for? Yes No

20. Are you currently being garnished? Yes No
If Yes, who is garnishing you? _____

21. Do you have to pay child support or alimony?
 Yes No
Are you behind? Yes by \$ _____ No

22. Other than family or friends, does anybody owe you money? Yes No

23. Do you have money in an IRA, 401(k), pension or other retirement plan? Yes No

24. Has someone died and left you an interest in their property which you still have not received? Maybe heir property? Yes No

25. How much in tax refunds last year? \$ _____

26. Fire, theft, gambling losses in last year? Yes No
Have a safe deposit box? Yes No

27. Have you had any foreclosures, repossessions, or turned in a car? Yes No

28. Other than your house and vehicles, do you own anything that is worth more than \$1,000? (Examples: boats, ATVs, tools, storage sheds, guns) Yes No

29. Are you buying any appliances from Alabama Power Company? Yes No

Best Estimate of How Much You Owe:

Credit cards \$ _____
Student Loans: \$ _____
Personal & Internet loans \$ _____
Lawsuits \$ _____
Medical \$ _____

Other: \$ _____
Banks/Credit Unions \$ _____
Old cellphone/cable or satellite \$ _____
Old landlords \$ _____
Repossessed or Totaled Vehicles \$ _____

List all vehicles with your name on the title – Even if they are paid off

First Vehicle: Bought in (Mo /Year) _____

Year: _____ Make _____ Model _____
Trim: _____ Mileage: _____ Miles driven/month _____

Who are you paying? (Incl. title pawn) _____
 Vehicle is paid off

Interest Rate _____% Monthly Pmt. \$ _____
Balance Owed \$ _____
Months Left on Loan _____ Amt behind on loan \$ _____

Who drives this vehicle? _____

Check appropriate boxes: 4 cyl 6 cyl 8 cyl 4X4
 Leather Seats Sunroof Damaged Not Running

Second Vehicle: Bought in (Mo./Year) _____

Year: _____ Make _____ Model _____
Trim: _____ Mileage: _____ Miles driven/month _____

Who are you paying? (Incl. title pawn) _____
 Vehicle is paid off

Interest Rate _____% Monthly Pmt. \$ _____
Balance Owed \$ _____
Months Left on Loan _____ Amt behind on loan \$ _____

Who drives this vehicle? _____

Check appropriate boxes: 4 cyl 6 cyl 8 cyl 4X4
 Leather Seats Sunroof Damaged Not Running

Third Vehicle: Bought in (Mo./Year) _____

Year: _____ Make _____ Model _____
Trim: _____ Mileage: _____ Miles driven/month _____

Who are you paying? (Incl. title pawn) _____
 Vehicle is paid off

Interest Rate _____% Monthly Pmt. \$ _____
Balance Owed \$ _____
Months Left on Loan _____ Amt behind on loan \$ _____

Who drives this vehicle? _____

Check appropriate boxes: 4 cyl 6 cyl 8 cyl 4X4
 Leather Seats Sunroof Damaged Not Running

List any other vehicles/boats/ATVs you own:

Other Debts with Collateral:

Furniture Stores: Who do you owe & how much:

Jewelry Stores: Who do you owe & how much:

Rent to Own or Lease/Purchase: What you are buying, name of company, and how much longer you have to pay:
