

Notes by Mr. Grainger:

Date: \_\_\_\_\_

Montgomery  Prattville  Troy  Extend Stay  Emergency  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: \_\_\_\_\_

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 Number Home: \_\_\_\_\_ Work: \_\_\_\_\_ Cell: \_\_\_\_\_

Email Address: \_\_\_\_\_ Soc. Security No. \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Address: *(if different from your address):* \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_ County: \_\_\_\_\_

**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?

AT&T Yellow Pages  Yellow Book Directory  Internet  TV Commercial  Letter from Firm  
 Referred by \_\_\_\_\_  Other \_\_\_\_\_

### 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 \_\_\_\_\_

2<sup>nd</sup> Job/Business ..... \$ \_\_\_\_\_ per \_\_\_\_\_

Spouse Job ..... \$ \_\_\_\_\_ per \_\_\_\_\_

Spouse 2<sup>nd</sup> Job/Business. \$ \_\_\_\_\_ per \_\_\_\_\_

Child Support Income ... \$ \_\_\_\_\_ per \_\_\_\_\_

Disability Income ..... \$ \_\_\_\_\_ per \_\_\_\_\_

Social Security ..... \$ \_\_\_\_\_ per \_\_\_\_\_

Pensions/Retirement .... \$ \_\_\_\_\_ per \_\_\_\_\_

Unemployment ..... \$ \_\_\_\_\_ per \_\_\_\_\_

Other Household Income \$ \_\_\_\_\_ per \_\_\_\_\_

Food Stamps \$ \_\_\_\_\_ per \_\_\_\_\_

3. Any changes to your income in the next 12 month?

Yes  No

4. How many people live in your home?

Adults \_\_\_\_\_ Children \_\_\_\_\_ Parents \_\_\_\_\_

5. Are you co-signed on debts with anyone?

Yes  No

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

Name: \_\_\_\_\_

7. Do you own or rent your home?

Own/Paying  Rent  Live with Relatives/Friend

8. If you are buying your home, how much is it worth?

\$ \_\_\_\_\_  Tax Value  Recent Appraisal

**1<sup>st</sup> Mortgage:** Company Name: \_\_\_\_\_

Balance owed: \$ \_\_\_\_\_ Monthly Pmt. \$ \_\_\_\_\_

How much behind on 1<sup>st</sup> mortgage? \_\_\_\_\_

**2<sup>nd</sup> Mortgage:** Company Name: \_\_\_\_\_

Balance owed: \$ \_\_\_\_\_ Monthly Pmt. \$ \_\_\_\_\_

How much behind on 2<sup>nd</sup> mortgage? \_\_\_\_\_

9. Besides your home, do you own any other real estate interests?  Yes  No

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

11. Do you owe taxes?  Yes  No Estimate below.

2012 & Before IRS \$ \_\_\_\_\_ State \$ \_\_\_\_\_  
2013 to Date IRS \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Aware of any tax liens?  Yes  No

12. Still need to file tax returns for these years?  
 2015  2014  2013  2012  2011

13. Gotten cash off of a credit card in last 3 months?  
 Yes  No \$ \_\_\_\_\_

14. Have you received any lump-sum settlements in the last year such as from a lawsuit?  Yes  No If so, from who and how much?  
\_\_\_\_\_

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

16. Do you have a vehicle or other property that belongs to someone other than a creditor?  Yes  No

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. Are you currently being sued?  Yes  No

19. Are there unpaid judgments against you?  Yes  No

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

20. Does anybody owe you money?  Yes  No

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

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

23. How much in tax refunds last year? \$ \_\_\_\_\_

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

25. In last 12 months, had any foreclosures or repossessions?  Yes  No

26. Besides a house or vehicles, what do you own that you could sell for more than \$1,000?  Yes  No  
**(Boats, 4-wheelers, tools, storage bldg, guns, jewelry**

**First Vehicle:** Bought in (Mo /Year) \_\_\_\_\_

Year: \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_  
Trim: \_\_\_\_\_ Mileage: \_\_\_\_\_ Miles driven/month \_\_\_\_\_

Who do you owe? (Incl. title pawn) \_\_\_\_\_  
 No 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 do you owe? (Incl. title pawn) \_\_\_\_\_  
 No 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 do you owe? (Incl. title pawn) \_\_\_\_\_  
 No 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

**Other Debts with Collateral?**

Furniture Stores  Jewelry Stores  Rent to Own or Lease/Purchase

Buying Appliances through Alabama Power

**Best Estimate of How Much You Owe:**

Credit cards \$ \_\_\_\_\_

Student Loans: \$ \_\_\_\_\_

Personal loans (banks/small loans) \$ \_\_\_\_\_

Pay day loans \$ \_\_\_\_\_

Lawsuits \$ \_\_\_\_\_

Medical \$ \_\_\_\_\_

Other: \$ \_\_\_\_\_

Banks/Credit Unions \$ \_\_\_\_\_

Old cellphone/cable or satellite \$ \_\_\_\_\_

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