

8. Checking Accounts: Name of Bank/Credit Union and Approximate Balance:

a. _____ \$ _____

b. _____ \$ _____

9. Savings Accounts: Name Bank/Credit Union and Approximate Balance

a. _____ \$ _____

b. _____ \$ _____

10. Other than real estate or vehicles, what do you own that is worth more than \$1,000?:

a. _____ \$ _____

b. _____ \$ _____

c. _____ \$ _____

11. List any boats/ATVs/motorcycles/RVs you own:

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

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

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

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

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

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

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

19. 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: _____

20. Do you have:

Term life insurance (cheap but does not build savings).

Whole life/Universal life (expensive but builds savings).

WHO YOU OWE MONEY TO (Estimate Amounts):

22. Best Estimate of How Much You Owe:

Credit cards \$ _____

Student Loans: \$ _____

Personal & Internet loans \$ _____

Republic Finance? Tower Loans?

Lawsuits \$ _____

Medical \$ _____

Other: \$ _____

Overdrawn Bank/CU Accounts or Signature Loans
\$ _____

Old cellphone/cable or satellite \$ _____

Old landlords \$ _____

Repossessed or Totaled Vehicles \$ _____

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:

23. Are you signed on any debts with someone else, such as a car or a house?

Yes No

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

2016 & Before IRS \$ _____ State \$ _____

2017 to Date IRS \$ _____ State \$ _____

Are you aware of any tax liens? Yes No

25. Still need to file tax returns for these years?

2019 2018 2017 2016 2015

26. Do you have to pay child support or alimony?

Yes No \$ _____/month.

Are you Behind? Yes by \$ _____ Not Behind

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

Name of Creditor(s): _____

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

29. Have you or your employer received court papers such as a lawsuit or a garnishment? Yes No

YOUR INCOME INCLUDING NON-FILING SPOUSE:

30. You:

Employed by _____

Occupation: _____

Since _____

Can you get paystubs for the last 6 months from all jobs you have worked? Yes No

Are you: Disabled Retired Unemployed

31. Your Spouse if Married and Living with You:

Employed with _____

Occupation: _____

Since _____

Can you get paystubs for the last 6 months from all jobs spouse has worked? Yes No

Is Spouse: Disabled Retired Unemployed

32. 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 _____

33. Expect any changes to your income in the next 12 months? Yes No

34. Relationship and Age of People Living with You (examples – mother 67 or roommate 29 or son 12):

35. Unusual Expenses such as college expenses, high medical expenses, care for disabled/elderly or high child support payments?

List unusually high expenses here and how much you pay:

Expense: _____ \$ _____

Expense: _____ \$ _____

Expense: _____ \$ _____

36. Gotten cash off of a credit card (*not a debit card*) in last 3 months?

Yes No \$ _____

37. Fire, theft, gambling losses in last year? Yes No

Estimate of loss in last year \$ _____

38. Someone we can contact if we can't find you:

Name: _____

Relationship: _____

Phone: _____

Name: _____

Relationship: _____

Phone: _____

NOTES: