

Debt Relief Intake Form

Name and Address

Name: _____
Last First Middle

Telephone Number Home: _____ Work: _____ Cell: _____

Email Address: _____ Soc. Security No. _____

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: 334-_____ Work: 334-_____ Cell 334-_____

Email Address: _____ Soc. Security No. _____

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? _____

How did you select our firm?

- BellSouth/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

5. Are you co-signed on debts with anyone?
 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 \$ _____ per _____

Disability Income \$ _____ per _____

Social Security \$ _____ per _____

Pensions/Retirement..... \$ _____ per _____

Unemployment..... \$ _____ per _____

Other Household Income. \$ _____ per _____

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

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

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

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

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

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

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

10. Do you owe taxes? Yes No Estimate below.
2009 & Before IRS \$ _____ State \$ _____
2010 to Date IRS \$ _____ State \$ _____
Aware of any tax liens? Yes No

10. Still need to file tax returns for these years?
 2013 2012 2011 2010

11. Credit card cash advances in last 3 months?
 Yes No \$ _____

12. Other than a house or car payment, have you paid any company or any person a total of \$600 in the last 3 months? Yes No If so, who and how much? _____

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

14. Do you have a vehicle or other property that belongs to someone else? Yes No

15. Reason to sue anyone (class action, car wreck, workers comp, etc.)? Yes No
Name of Attorney helping you: _____

16. Being sued / in a lawsuit? Yes No

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

18. Does anybody owe you money? Yes No

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

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

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

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

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

24. Besides a house or vehicles, what do you own that you could sell for more than \$1,000?

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: Manual Transmission
 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

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

Who drives this vehicle? _____

Check appropriate boxes: Manual Transmission
 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 _____% Mthly Pmt. \$ _____
Balance Owed \$ _____
Months Left on Loan _____ Amt behind on loan \$ _____

Who drives this vehicle? _____

Check appropriate boxes: Manual Transmission
 4X4 Leather Seats Sunroof Damaged Not Running

Other Debts with Collateral?

Tax Liens Judgments Furniture Jewelry
 Best Buy Credit Card AAFES/Star Card
 Dell Computer Court Costs/Fines
 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 \$ _____

Revised 1/2/2014