



**PERSONAL PROPERTY:**

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

a. \_\_\_\_\_ \$ \_\_\_\_\_

b. \_\_\_\_\_ \$ \_\_\_\_\_

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

a. \_\_\_\_\_ \$ \_\_\_\_\_

b. \_\_\_\_\_ \$ \_\_\_\_\_

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

a. \_\_\_\_\_ \$ \_\_\_\_\_

b. \_\_\_\_\_ \$ \_\_\_\_\_

c. \_\_\_\_\_ \$ \_\_\_\_\_

10. How many vehicles have your name on the title?  
\_\_\_\_\_

**FIRST VEHICLE:** Bought in (Mo./Year) \_\_\_\_\_

Year: \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

Accessory Trim Pkg: \_\_\_\_\_ Mileage: \_\_\_\_\_

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

Not Running

**SECOND VEHICLE:** Bought in (Mo./Year) \_\_\_\_\_

Year: \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

Accessory Trim Pkg: \_\_\_\_\_ Mileage: \_\_\_\_\_

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

Not Running

**THIRD VEHICLE:** Bought in (Mo./Year) \_\_\_\_\_

Year: \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

Accessory Trim Pkg: \_\_\_\_\_ Mileage: \_\_\_\_\_

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

11. List any other vehicles/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, 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):**

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

**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 \$ \_\_\_\_\_

**23. 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:

\_\_\_\_\_

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

Yes  No

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

2017 & Before IRS \$ \_\_\_\_\_ State \$ \_\_\_\_\_  
2018 to Date IRS \$ \_\_\_\_\_ State \$ \_\_\_\_\_

Are you aware of any tax liens?  Yes  No

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

2021  2020  2019  2018  2017  2016

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

Yes  No Behind?  Yes by \$ \_\_\_\_\_  No

28. Have you had any foreclosures, repossessions, or voluntarily turned in a car?  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 with \_\_\_\_\_  
How Long? \_\_\_\_\_

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 \_\_\_\_\_  
How Long? \_\_\_\_\_

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

Is Spouse:  Disabled  Retired  Unemployed

**Notes:**

32. Please list take-home pay and other income:

**MAIN JOB** ..... \$ \_\_\_\_\_ per \_\_\_\_\_  
2<sup>nd</sup> 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 \_\_\_\_\_

**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 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 high medical expenses, care for disabled/elderly or high child support payments?

List unusually high expenses here and how much you pay:

\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_  
\_\_\_\_\_ \$ \_\_\_\_\_

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: \_\_\_\_\_